

Welcome to the NSPS Tutorial on Establishing a Performance Plan in the Department of Defense's Performance Appraisal Application.



Text Captions

How to Use this Tutorial.



This screen gives you a short demonstration on the interface features of this tutorial. If you are familiar with "screencam" demos like this, you can skip it by selecting the Skip this screen button.

The Content Area

The main part of the screen is the content area. The text, graphics, and simulations of user actions are in this area. Generally, content will be presented similar to watching a movie, without requiring any interaction from you.

The Playback Controller

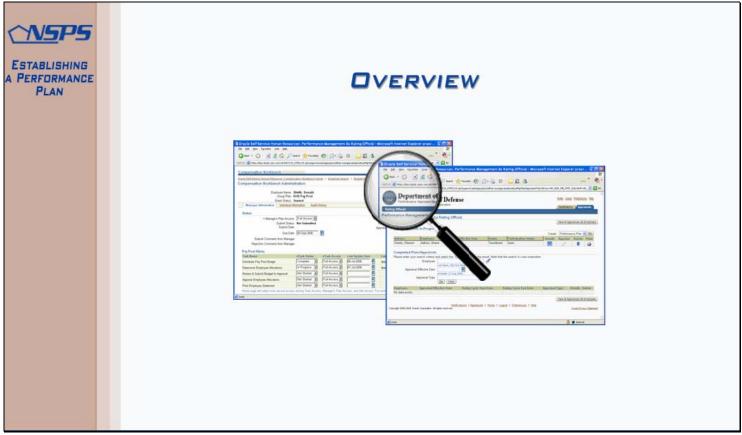
This set of buttons allows you to Play and Pause the tutorial.

The Narration Text area

This area shows the text corresponding to the audio narration.



Overview



Text Captions

This section gives you an overview of the Performance Appraisal Application.

The Performance Appraisal Application is an electronic tool that supports the National Security Personnel System (NSPS) performance management system.

The tool streamlines and automates performance management processes and documentation requirements and makes it easier and more efficient to track and monitor performance.

It is one of two electronic support tools being developed to help employees and supervisors manage performance throughout all phases of the performance management lifecycle.



The Performance Appraisal Application provides online access to employees and supervisors so you can jointly discuss and document the job objectives and contributing factors that are the basis for appraising your performance.

It provides a single repository to capture and maintain your performance record so that updating your plan is easier.

When the performance cycle is completed, your performance appraisal and your supervisor's recommended rating flow automatically to the other automated tool known as Compensation Workbench (CWB).

This is where the information is used by pay pool panels and pay pool managers to determine final ratings and payout distributions.



Text Captions

The Performance Management Lifecycle

THE PERFORMANCE MANAGEMENT LIFECYCLE



Text Captions

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Plan

Monitor

Develop

Rate

and Reward.

During each phase, specific activities are conducted, many of which are completed in the Performance Appraisal Application.



If you have already taken one of the NSPS performance management courses and are familiar with the performance management lifecycle, you may skip the following section and proceed to the Getting Started section by selecting the above button.

For those of you who want more information, the following section provides an overview of the performance management system.



Text Captions

The Performance Management Lifecycle at a Glance





The Performance Appraisal Application is an electronic tool that supports the lifecycle of the NSPS performance management system and consists of five phases. During each phase, specific activities are conducted.

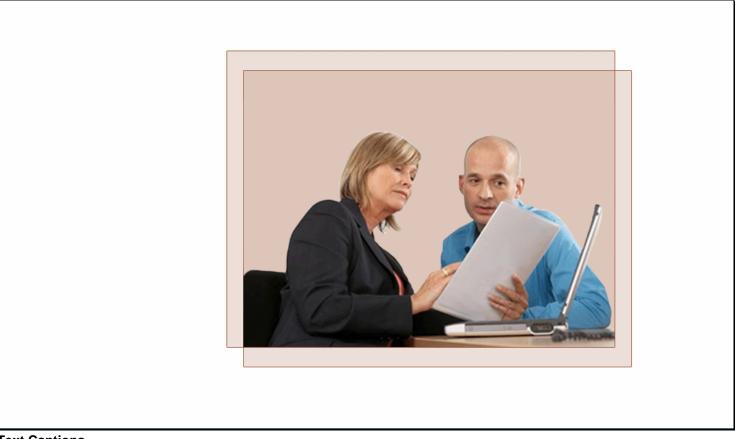
Many of these activities are completed in the Performance Appraisal Application. Let's take a moment to review the performance management lifecycle.



Plan Phase

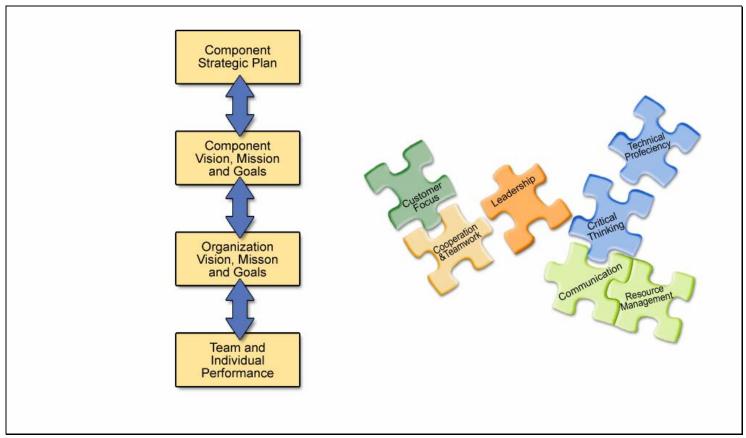
During the Plan phase, supervisors with responsibilities for rating employees (also referred to as rating officials), and with employee input, develop the performance plans.

These plans describe the measurable job objectives that employees are expected to achieve during the appraisal cycle. The following activities take place during the Plan phase:



Text Captions

Employees and rating officials discuss performance expectations for the performance cycle.



Rating officials, with employee input, develop job objectives (what you do) and identify the contributing factors that are important for accomplishing each job objective (how you do it).

Typically, employees have between three to five job objectives that are focused on outcomes and aligned with organizational goals. For each job objective, typically between one to three contributing factors are selected.



The Performance Appraisal Application supports the exchange of information and the establishment of the plan during this phase. Also, employees and rating officials establish a process for ongoing communication.



Monitor Phase

During the Monitor phase, employees and rating officials monitor performance.



This ongoing communication ensures that there is a shared understanding about what is not working, and that the performance plan accurately reflects the major performance expectations.

Along with ongoing monitoring activities, there is one required event - an interim review - although more than one can be conducted. Typically, an interim review occurs midway through the performance cycle.

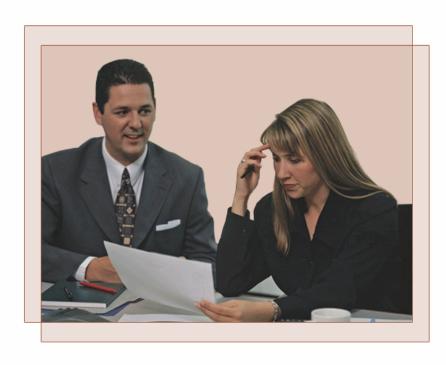
During this activity, employees are encouraged to complete a self-assessment.

Rating officials and employees should have conversations regarding the performance to date and make adjustments to the plans, if necessary. These activities are recorded in the Performance Appraisal Application.



Develop Phase

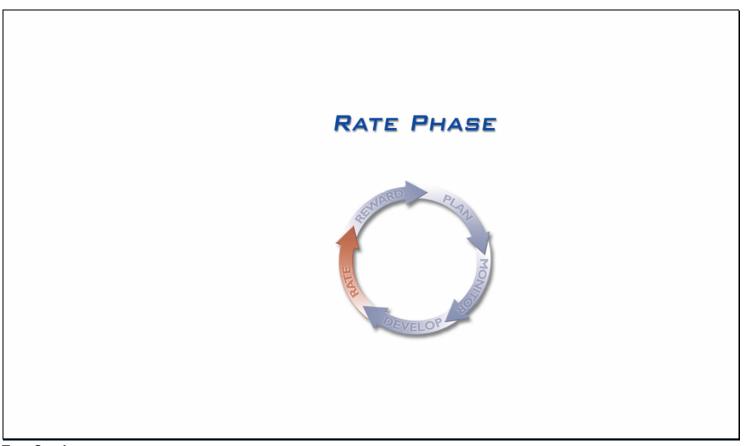
Developing performance is integrated with the performance management process.



Along with meaningful performance-related discussions that help reinforce employee strengths and correct weaknesses, discussing developmental opportunities occurs during the Develop phase.

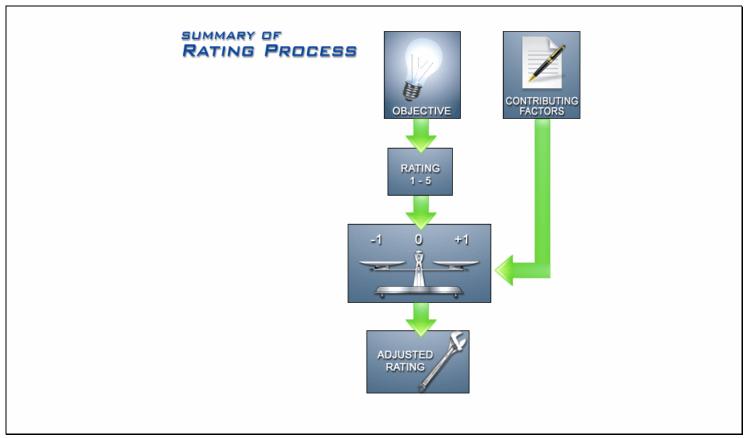
These professional or technical development opportunities further enhance an employee's contribution to the organization's mission and assist with achieving career goals. Developmental opportunities may include training, mentoring, and coaching.

There are no system tasks in the Performance Appraisal Application for this phase.



Rate Phase

In the Rate phase, employees' performance is rated by rating officials. Performance is rated based on two factors:



First, employees are rated on what they accomplished. Each job objective is rated between one and five using the "measuring stick" of the NSPS performance indicator appropriate to an employee's pay schedule and pay band.

This rating is recorded in the Performance Appraisal Application.

Then the rating official determines how the contributing factors influenced the associated job objective overall, and indicates whether it increases the job objective rating by a factor of 1, decreases the rating by a factor of 1, or has no effect (0).

This contributing factor adjustment is recorded in the Performance Appraisal Application.

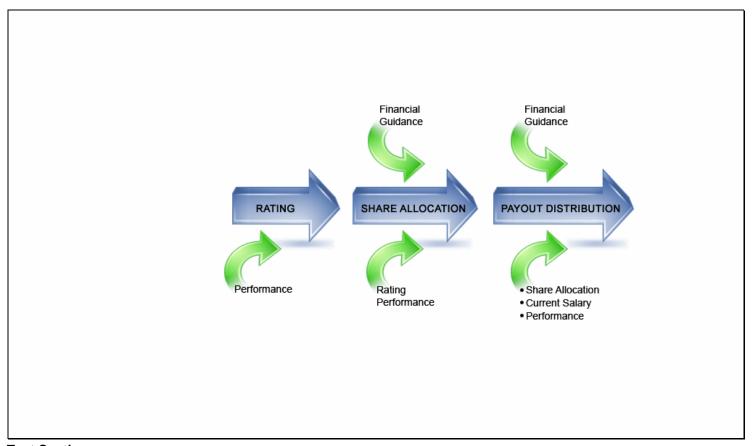
Combining the job objective rating and contributing factor assessment (expressed as +1, 0, or -1) results in an adjusted rating for each job objective. The adjusted rating of each job objective is averaged to determine the recommended rating of record.

The recommended rating of record is calculated in the Performance Appraisal tool based on the adjusted job objective rating, along with the rating official's documented assessment.



Reward Phase

Reward activities that involve system tasks take place in CWB. At the conclusion of the rating phase, the recommended rating of record is transferred from the Performance Appraisal Application to CWB.



During the Reward phase, rating officials, based on the recommended rating of record, are responsible for recommending the number of shares and payout distribution.

This information is provided to pay pool panels responsible for reviewing the recommended ratings of record, share assignments, and payout distributions, and making final determinations.



When the pay pool process is completed, rating officials are informed of the final rating and payout decisions. In turn, rating officials meet with employees to discuss the outcome.

The final rating of record is documented in the Performance Appraisal Application.





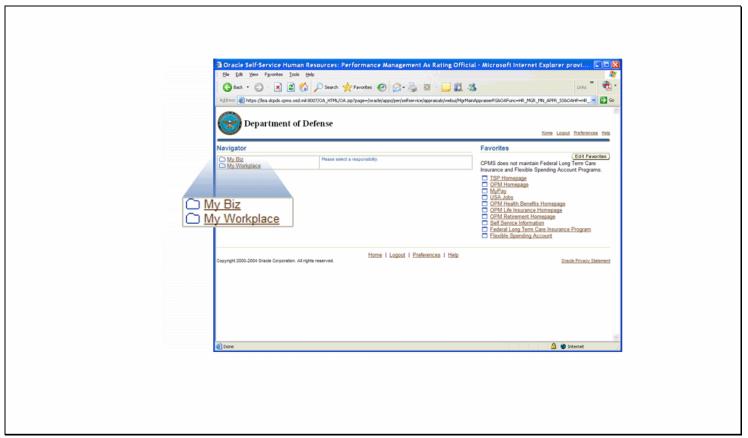
Getting Started



Employees and supervisors who are rating officials are encouraged to complete this tutorial.

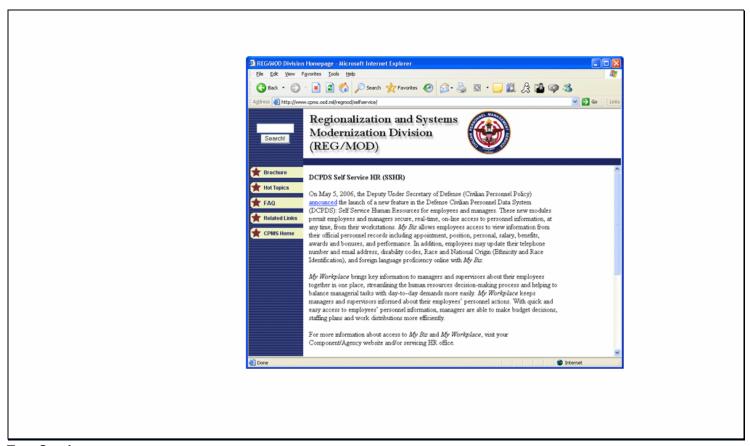
Under NSPS, employees and rating officials have specific roles and responsibilities to develop and monitor performance throughout the appraisal period.

This overview exposes you to how to complete the performance plan - the first phase of the NSPS performance management process.



Access to the online tool suite is gained through one of two self-service portals. Employees access the Performance Appraisal Application through "My Biz". Rating officials access it through "My Workplace".

If you have not registered for My Biz or My Workplace, you will need to do so before you set up a performance plan.



To get more information on how to access and log on to My Biz or My Workplace, visit your Component home page or http://www.cpms.osd.mil/regmod/selfservice/.



The Performance Appraisal Application, like all the online tools, is role-based. What does this mean? It means that you enter information based on your role. There are two roles in the Performance Appraisal Application - employee and rating official.

Under NSPS, rating officials are responsible for establishing performance plans; however, it is good practice for them to engage employees in this process.

The Performance Appraisal Application supports the easy exchange of information between employees and rating officials throughout the performance management lifecycle.



We begin our overview by seeing how rating officials establish a performance plan. We will then look at how employees contribute to their plans. Finally, we will look at how rating officials approve plans.

By the end of this tutorial, you will understand how employees and rating officials work together to establish a performance plan.



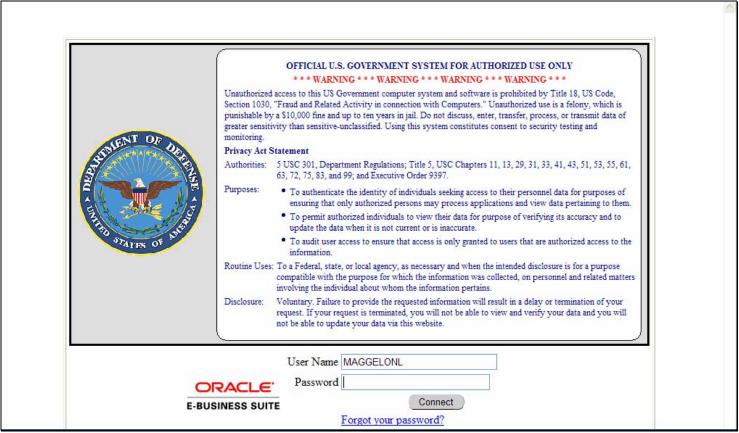
Logging on as a rating official and initiating a performance plan.



Text Captions

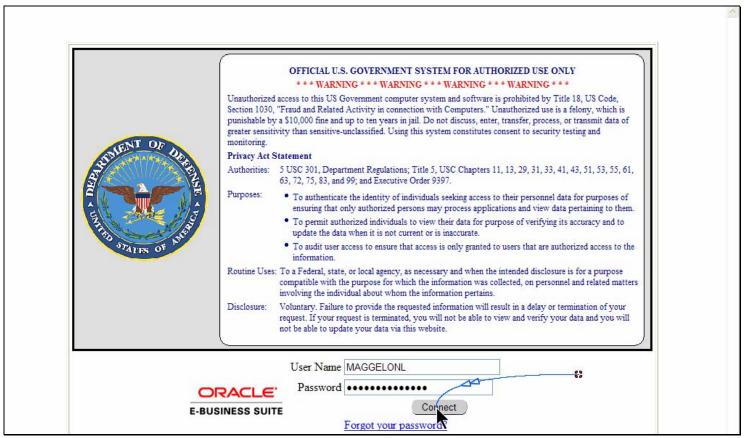
For the purpose of this demonstration, first we will log on as a rating official. Luke Maggelon is a supervisor for the Engineering Systems Management Office. He supervises five employees.

To begin, Luke logs on to My Workplace at a URL provided by his Component. He enters his user name and password.



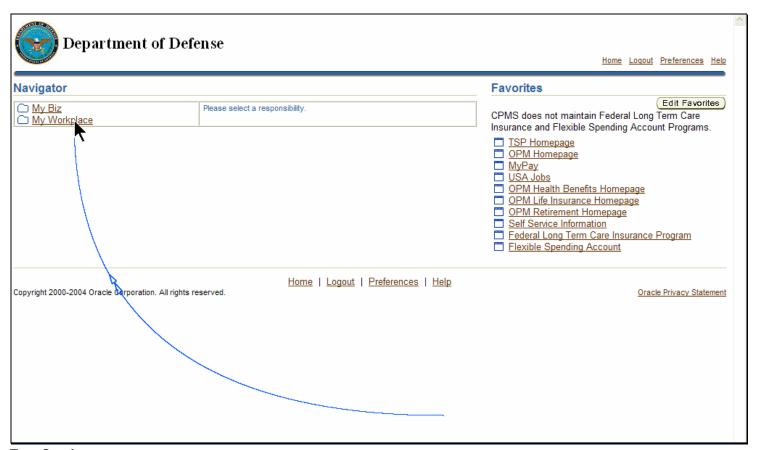
Text Captions

To begin, Luke logs on to My Workplace at a URL provided by his Component. He enters his user name and password.



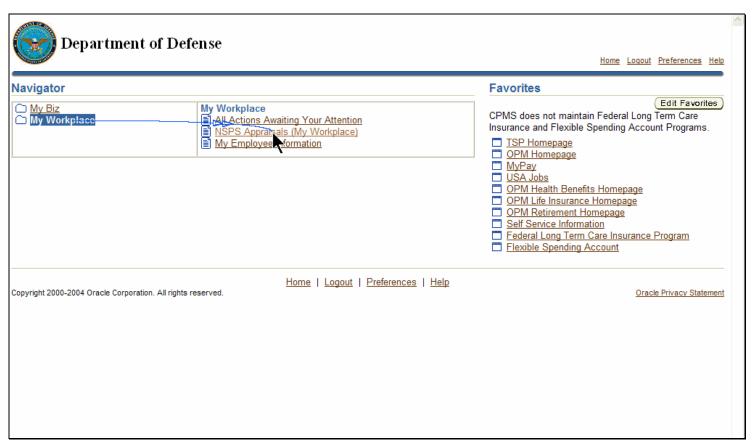
Text Captions

He then selects Connect.

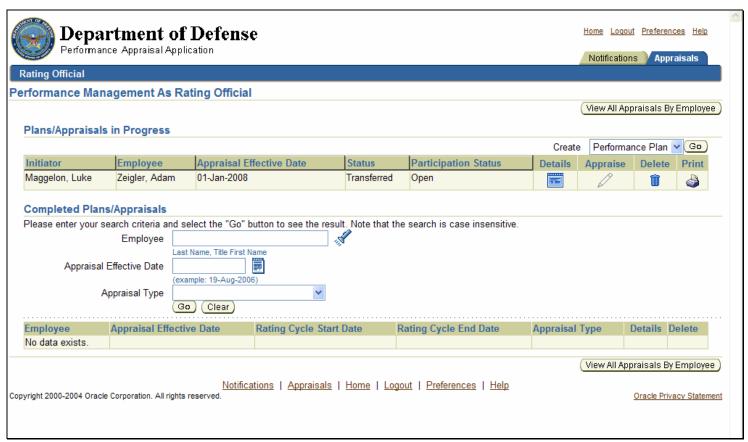


Text Captions

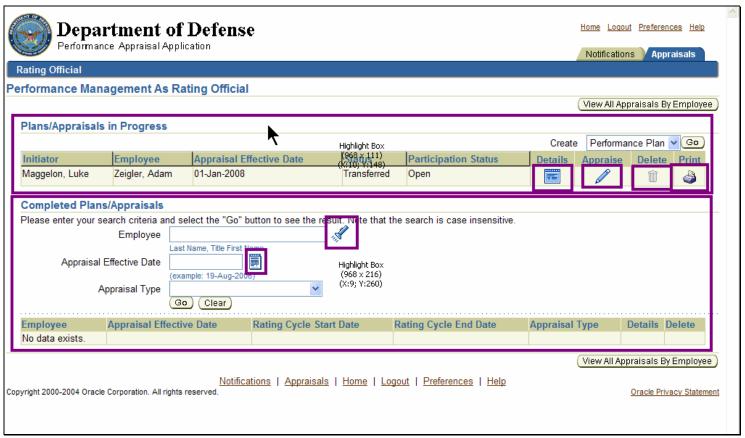
He selects My Workplace, then NSPS Appraisals (My Workplace).



He selects My Workplace, then NSPS Appraisals (My Workplace).



From here, Luke is directed to the *Rating Official - Performance Management as Rating Official* page. Let's take a moment to review the icons that he, and you, will need to become familiar with to complete a performance plan.



Selecting the Find icon opens a Find window, allowing you to search for information.

Selecting the Details icon displays read-only information.

Selecting the Print icon prints the current information.

Selecting the Pencil icon in the inactive state does not allow you to update information. This usually implies that you do not have ownership of the appraisal. The ownership concept is covered later in this lesson.

Selecting the Pencil icon in the active state allows you to update information. This usually implies that you have ownership of the appraisal.

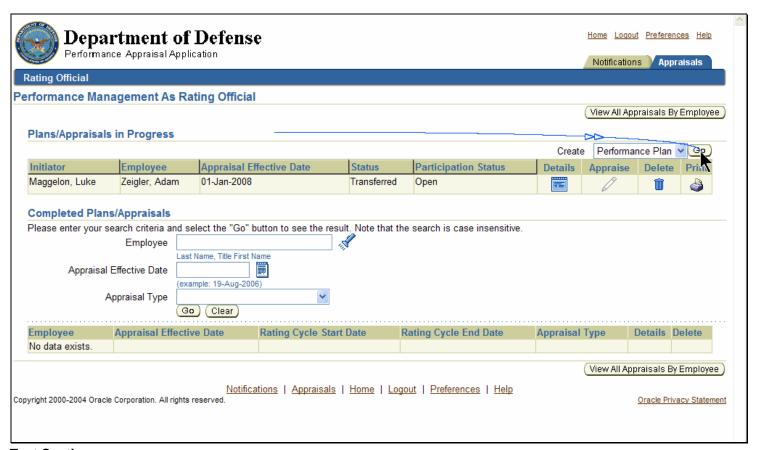
Selecting the Delete icon in the inactive state does not allow you to delete information. Selecting the Delete icon in the active state allows you to delete information.

Selecting the Calendar icon displays a thumbnail of a calendar, allowing you to select a date. This is associated with date fields only.

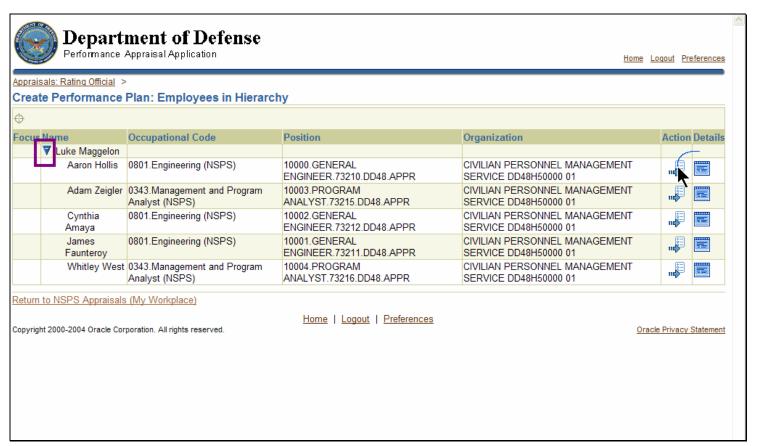
Okay, now that you are familiar with the icons, let's take a look at what is on this page. There are two areas for you to note:

One area is Plans/Appraisals in Progress that contains active appraisals created by the rating official.

The second area is Completed Plans/Appraisals that contains appraisals that have gone through the entire appraisal process.



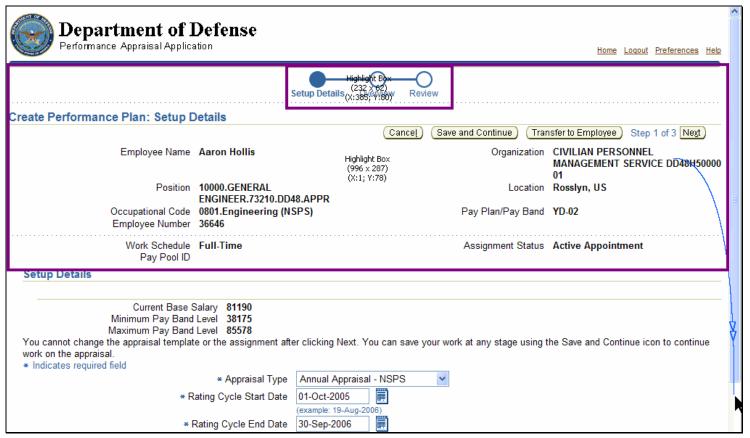
To get started, Luke selects Create Performance Plan.



On this page, the rating hierarchy is displayed. As the rating official, Luke's name is listed at the top. Below his name are the employees he is responsible for rating.

Selecting the Branch node icon displays a specific branch or level in the organizational hierarchy for an employee.

Luke will establish a plan for Aaron Hollis by selecting the Action icon.



The first thing you may notice on the Create Performance Plan - Set Up Details page is that a navigation bar is introduced at the top of the screen.

The navigation bar indicates where you are in the process. The process differs for rating officials and employees. For rating officials, it includes three steps: Setup Details, Overview, and Review.

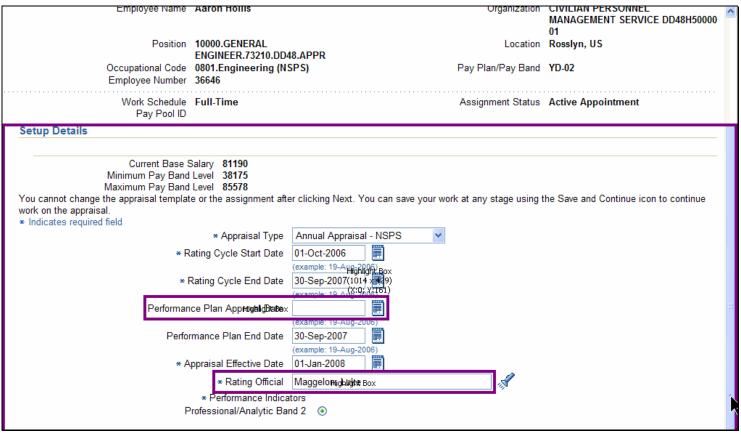
Rating officials are responsible for completing these steps when creating performance plans.

During step 1, Setup Details, the appraisal type, dates, and rating official are established. During step 2, Overview, information may be updated. During step 3, Review, information that was updated and saved is reviewed.

Note: you should make it a habit to use the Review screen to verify that all information is correct for a given employee.

The Set-up Details page provides the information you need as a rating official to develop an effective performance plan. The page is divided into two sections:

The top section provides details about the employee, including his or her occupation, pay schedule, and pay band.

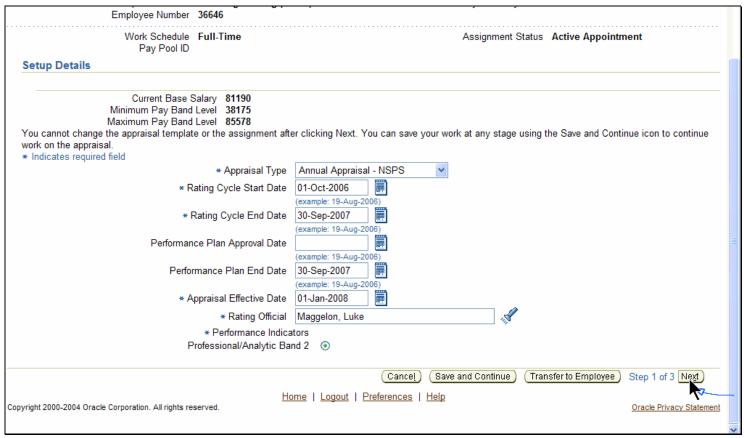


The second section provides information about the appraisal cycle.

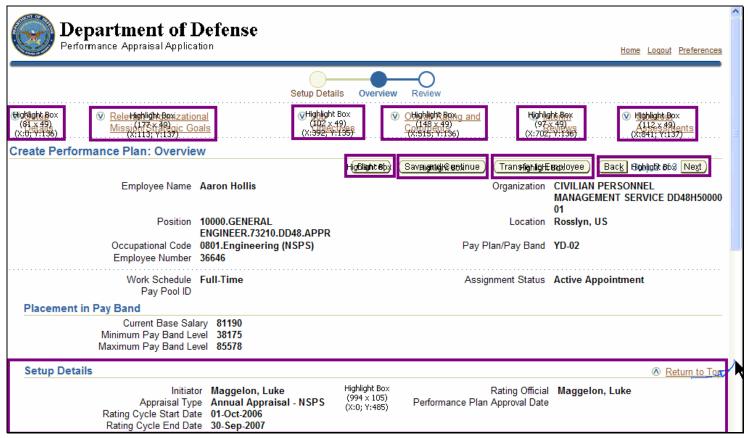
The system is designed so that the dates auto-populate for the appraisal period. If necessary, you can manually change them.

The Performance Plan Approval Date field remains blank until the plan receives a second-level review and is approved.

The rating official field is also auto-populated, but can be manually changed.



When the information has been completed, select **Next** to advance to step 2 – the Overview page.



Take a look at the top of the page. Notice that there are links to the following:

Set up Details – By selecting this link you go back to step 1.

Relevant Organizational Mission/Strategic Goals - By selecting this link you can enter your organization's mission and strategic goals for the appraisal period.

Job objectives must align with organizational goals, so it is helpful to complete this section first. If you are unfamiliar with your organization's goals for the performance cycle, you are encouraged to speak with your supervisor.

Job Objectives - By selecting this link you can enter the draft job objectives. Remember, typically employees have between three and five objectives.

As a best practice, rating officials should share draft job objectives with employees so that there is a mutual understanding of what is expected of them during the appraisal period.

Overall Rating and Comments - By selecting this link, you can document the end-of-cycle rating and record your feedback.

Interim Reviews - By selecting this link, you can document an interim review. Remember, at least one interim review is required.

Closeout Assessments - By selecting this link, you can document a closeout assessment for an employee who will no longer be evaluated by you at the end of the appraisal cycle.

Next, five buttons appear on the top and bottom of each page that allow you to do the following:

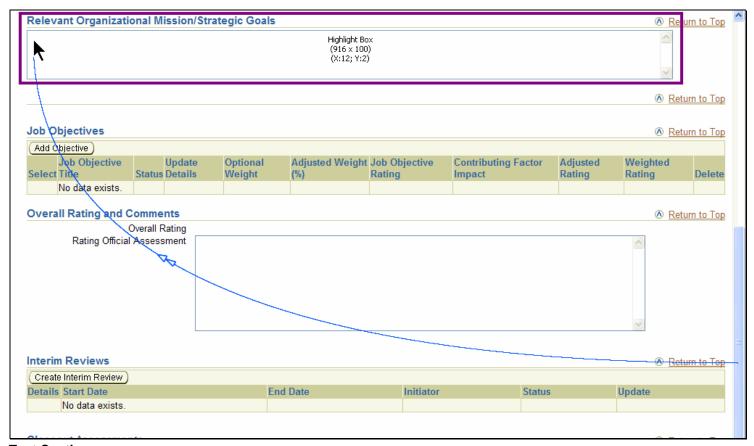
Cancel: Selecting this button cancels all changes and returns you to the main page.

Save and Continue: Selecting this button saves your changes and allows you to proceed on the same page.

Transfer to Employee: Selecting this button notifies your employee that the performance plan is ready for review and comment.

Back and **Next:** Selecting these buttons brings you to the previous or next step.

Now let's take a look at the next section of the page. The information in this section carries over information from step 1, Setup Details.



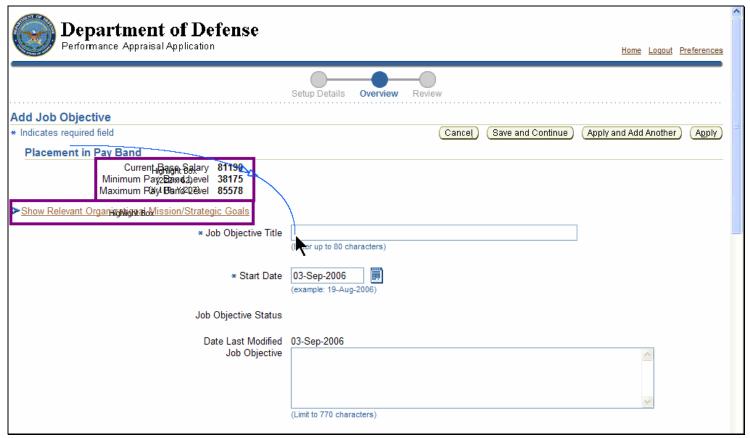
Text Captions

In this section of the page you enter your organizational mission and strategic goals. You may enter information in two ways: You may manually type the information; or you may "cut and paste" information from another document.



Next you enter the employee's job objectives by selecting **Add Objective**. After an objective has been developed, the summary fields will be auto-populated so that you have a quick status update of each objective.

Now let's watch Luke add a job objective for Aaron. He starts by selecting **Add Objective**.

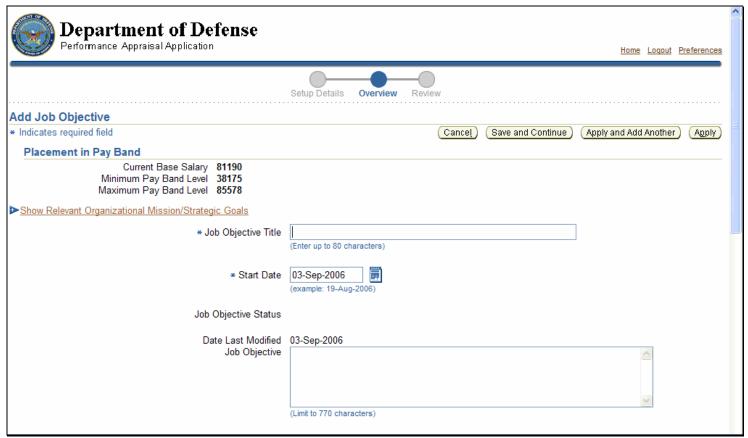


Notice a few important pieces of information:

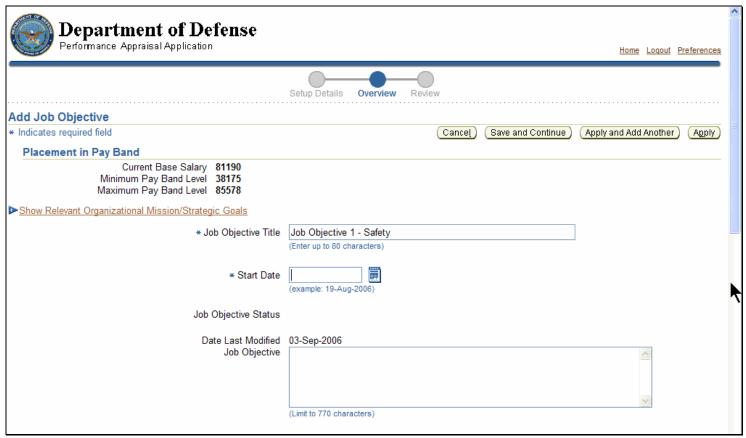
First, the salary information is carried forward so that Luke can consider this when establishing job objectives.

Second, a link to the organization mission and strategic goals is provided for quick reference.

To add an objective, Luke first creates a job objective title. These typically include numbers so that they sort numerically in lists.



To add an objective, Luke first creates a job objective title. These typically include numbers so that they sort numerically in lists.



Then he enters the start date. Remember that the period of performance must be within the appraisal period.

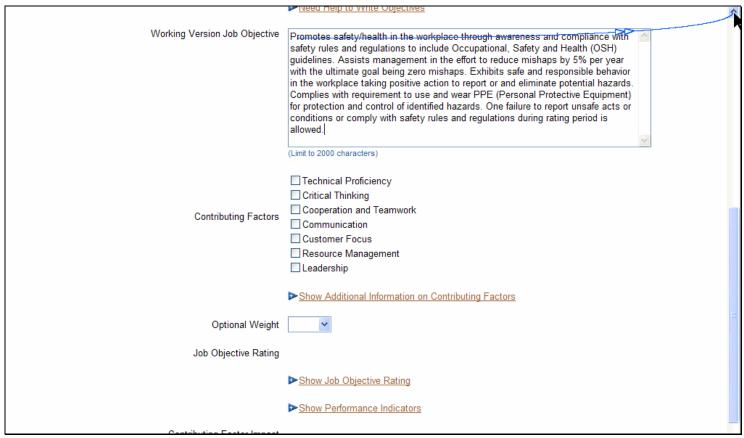


Next Luke enters the job objective. This is the section where the final job objective is documented.

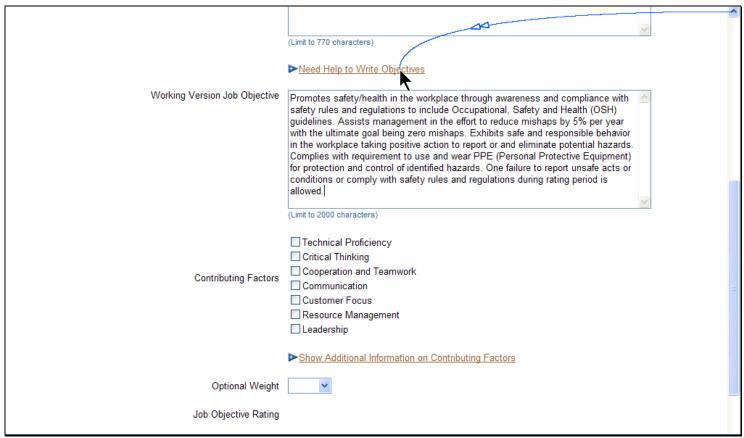
Rating officials and employees are encouraged to use the Working Version Job Objective text box to develop job objectives and exchange input and feedback.

After this process has been completed, either Luke or Aaron cuts and pastes the language into the Job Objective text box.

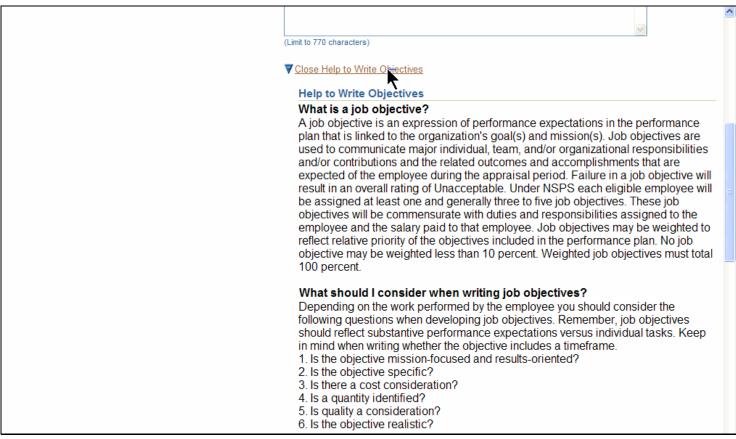
Note that after the job objective has been approved, the information in the Working Version Job Objective text box is purged. And remember, supervisors are required to have at least one "supervisory" job objective.



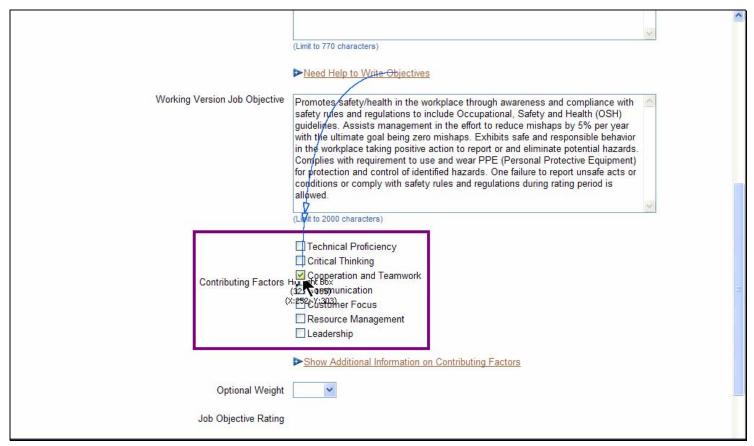
Note that after the job objective has been approved, the information in the Working Version Job Objective text box is purged. And remember, Supervisors are required to have at least one "supervisory" job objective.



Luke wants assistance to develop the job objective, so he selects **Need Help to Write Objectives**. He is directed to a series of questions that help him frame an effective job objective.



When your are done with the help, select **Close Help to Write Objectives** and you are returned to the job objective section.

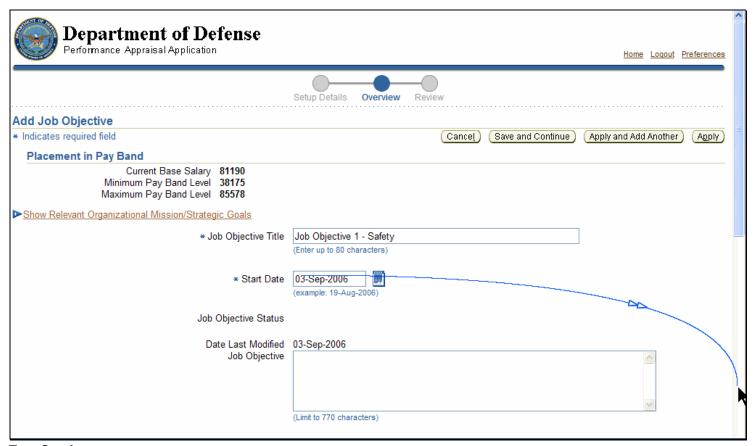


Next, Luke determines the influence of Contributing Factors. This is the section used to select the appropriate contributing factors for a particular job objective.

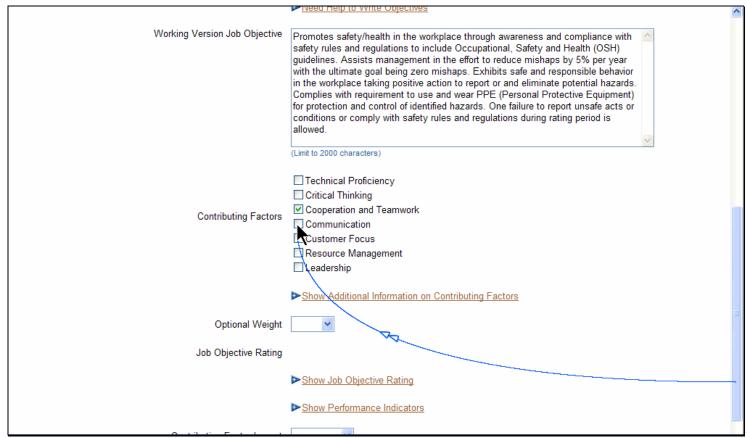
Typically one to three contributing factors are selected for each job objective. The contributing factor(s) must be relevant to the completion of the job objective. There are seven contributing factors.

For this objective, Luke selects two contributing factors.

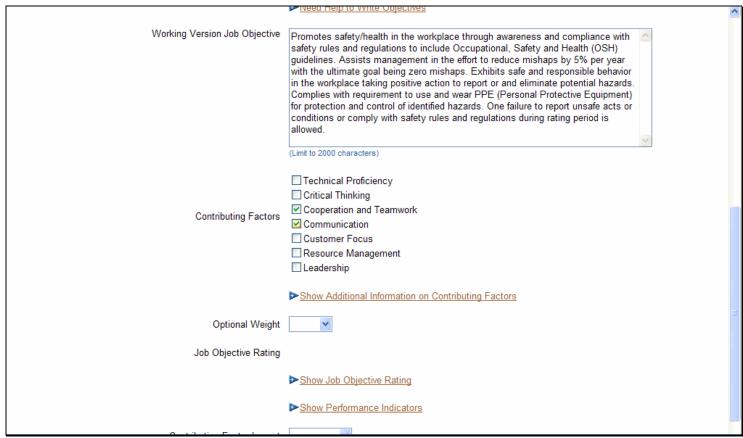
Cooperation and Teamwork is the first.



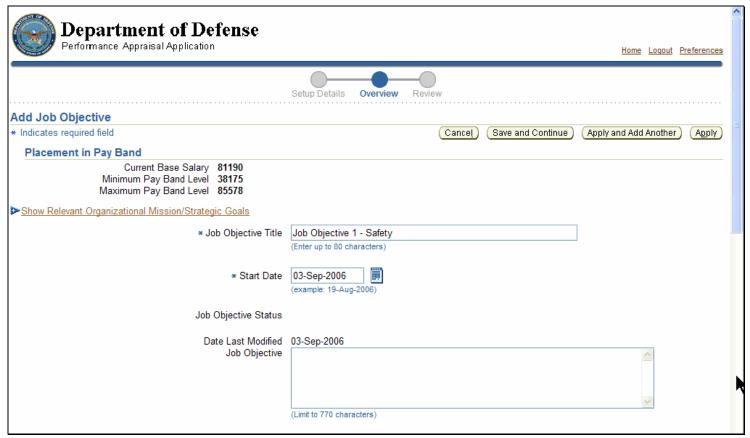
Note that the page scrolls to the top after you select each contributing factor, requiring you to scroll back down to select the next one.



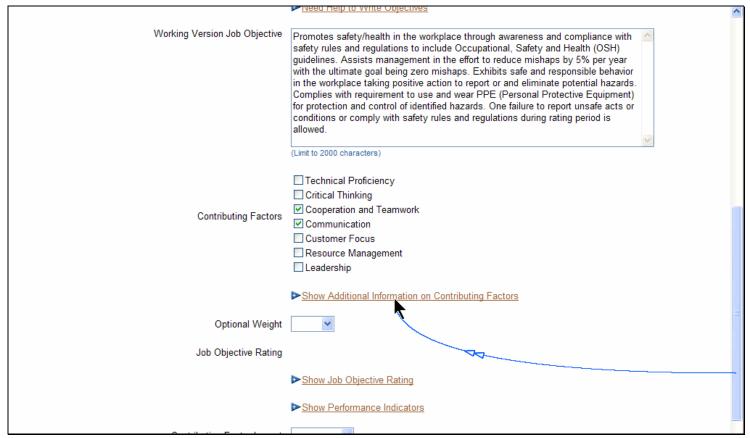
Communication.



Communication.

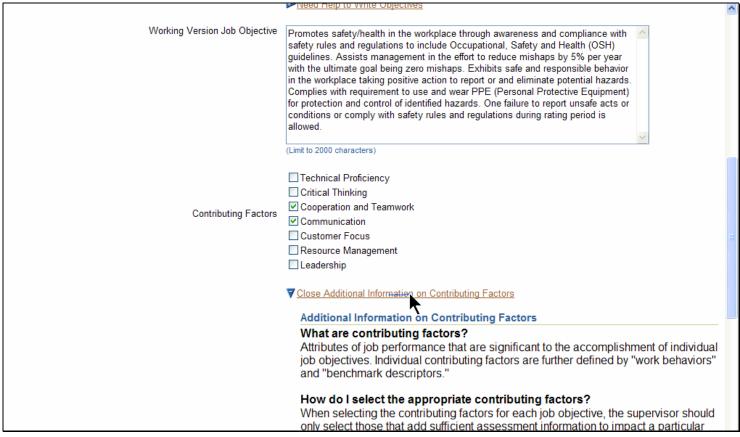


Communication.

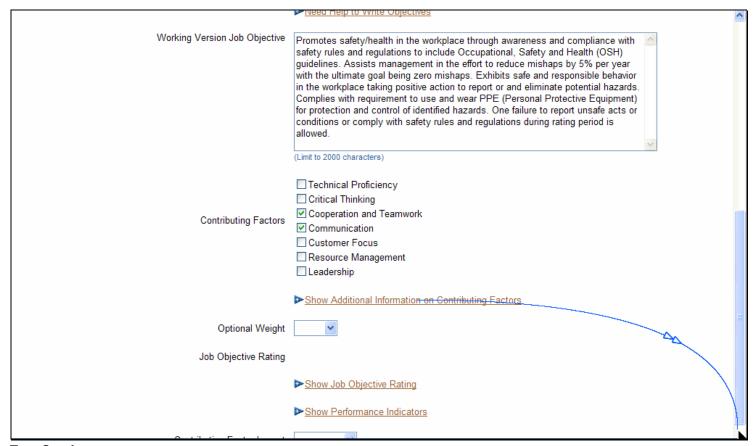


Text Captions

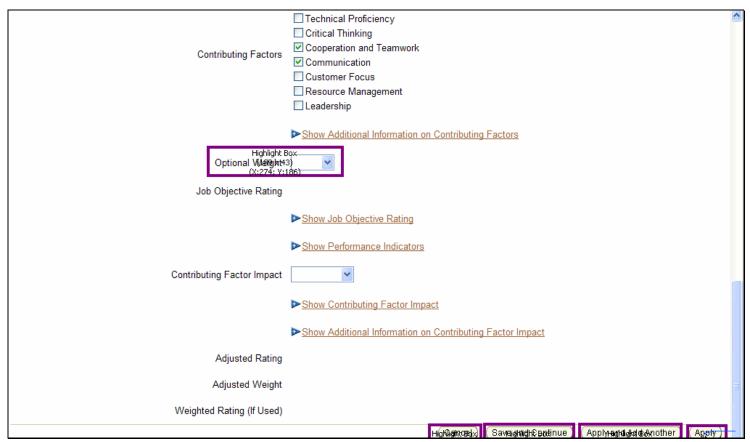
Luke wants additional assistance with determining whether a contributing factor is appropriate. He selects **Show Additional Information on Contributing Factors**. He is directed to a series of questions that help him choose contributing factors.



When done, he selects **Close Additional Information on Contributing Factors** to return to the contributing factor section. Remember, the Leadership contributing factor must be selected for a supervisory job objective.



When done, he selects **Close Additional Information on Contributing Factors** to return to the contributing factor section. Remember, the Leadership contributing factor must be selected for a supervisory job objective.



Determine the weight of a job objective – Weighting job objectives is optional and may only be identified by the rating official. If weighting is used, the total for all job objectives must equal 100 percent.

No job objective may be weighted less than 10 percent and weights must be made in increments of 5 percent. For the purpose of this demonstration, the job objective is not weighted.

Luke has completed entering the job objective and the associated contributing factors. At this stage he may do the following:

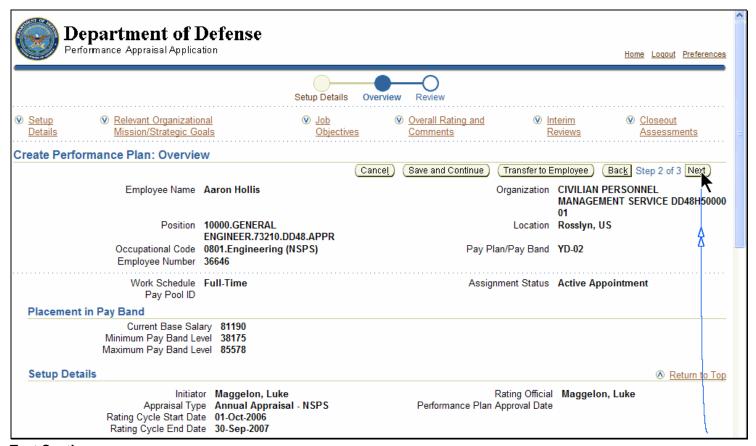
Cancel

Save and Continue

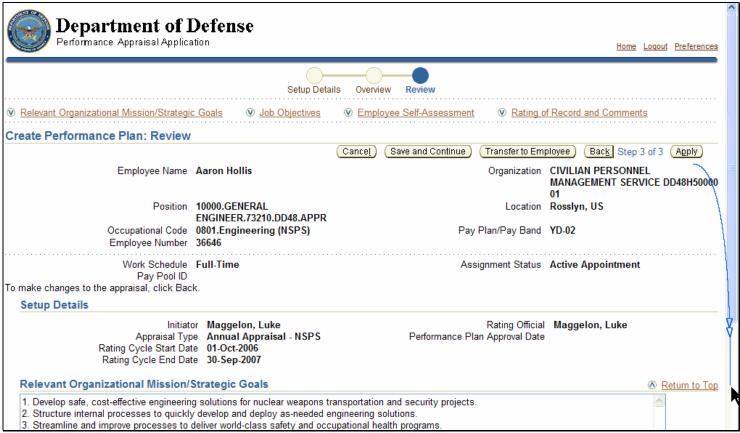
Apply and Add Another

or Apply.

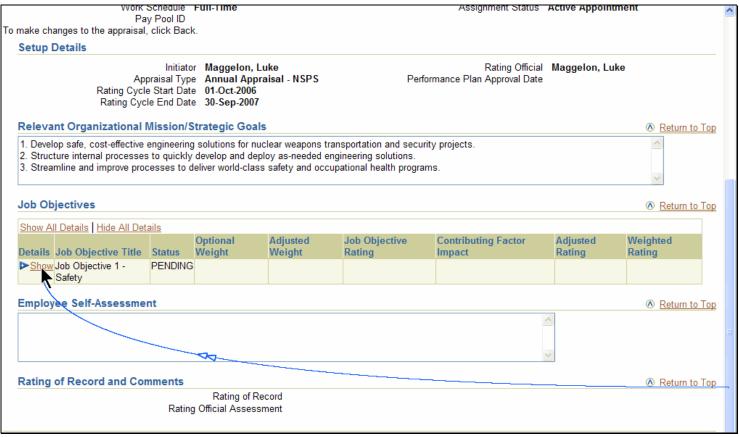
For the purpose of this overview, he selects **Apply**.



Selecting Apply returns Luke to the Overview page. From here, he can continue to step 3, Review, by selecting **Next**.

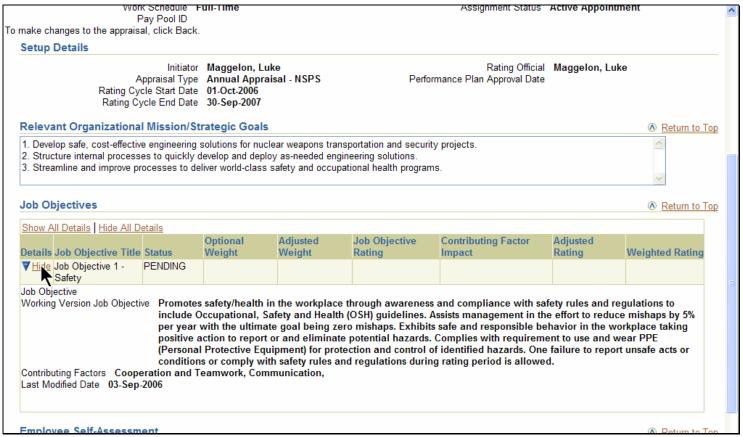


During the Review step, Luke reviews the performance plan for accuracy. Please note that in the Review step, information may not be updated or edited.

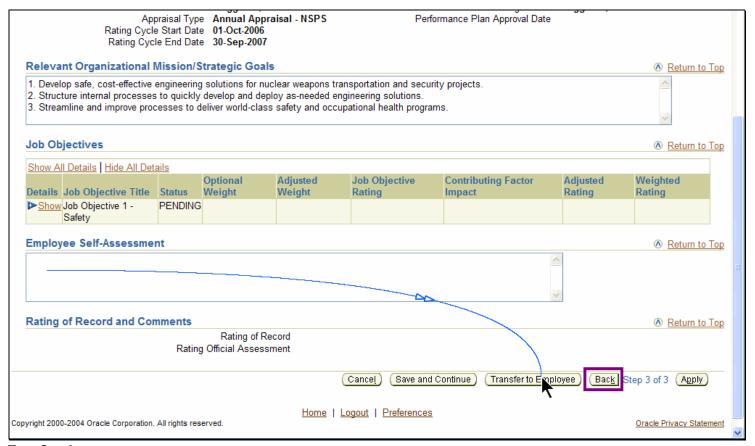


Also note that the Review step carries over information from steps 1 and 2.

To view a job objective, Luke selects **Show** and the job objective is displayed.



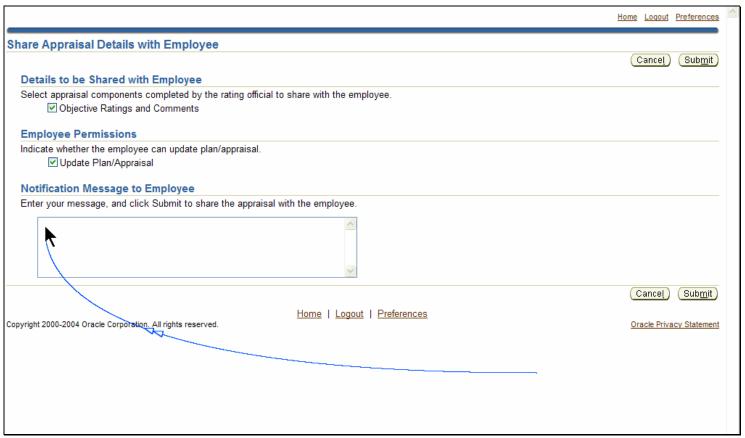
To return to the review screen, he selects **Hide** and the information is collapsed.



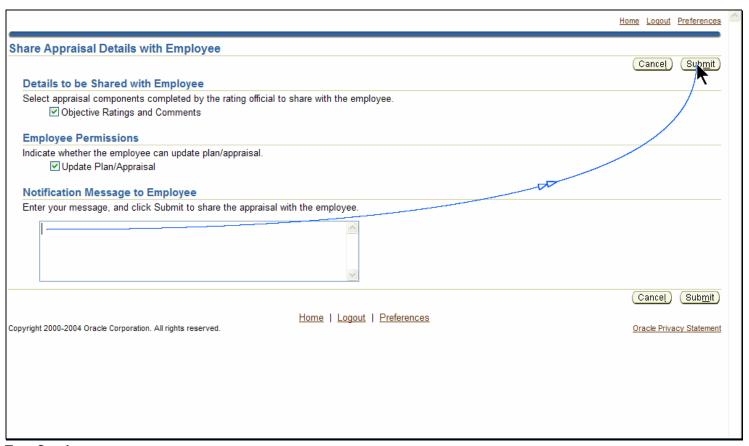
To update information, he selects the **Back** button to return to step 2, Overview, and follows the same process detailed under step 2 to update or edit information.

At this point, Luke is ready to transfer the performance plan to Aaron for review and comment. Keep in mind that the transfer can occur at any time during the performance cycle.

He selects **Transfer to Employee**.

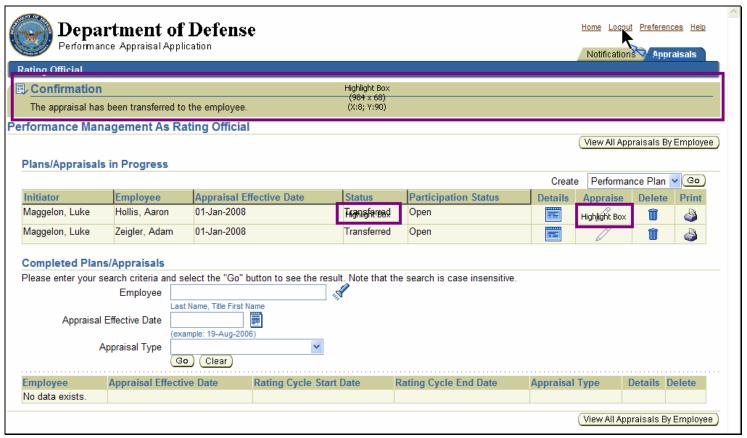


He enters his comments to Aaron under **Notification Message to Employee**. The message will appear in Aaron's notification under the Notifications tab.



He enters his comments to Aaron under **Notification Message to Employee**. The message will appear in Aaron's notification under the Notification tab.

When Luke is finished, he selects **Submit**, and the plan is transferred.

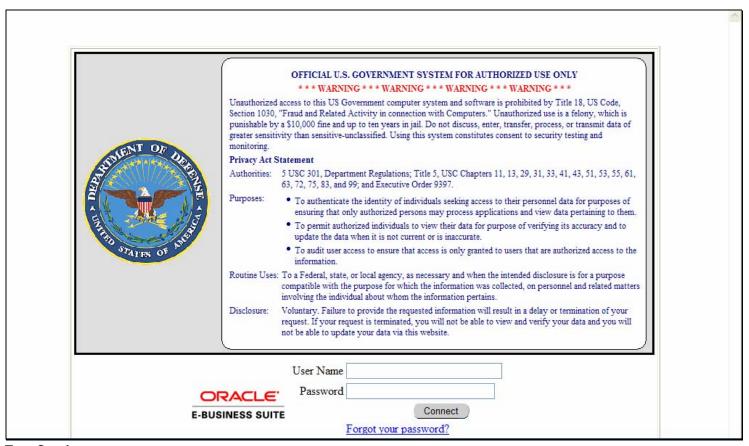


Under Confirmation, a note is given to indicate that the plan has been successfully transferred.

Note that the status shows "Transferred," and the Appraise Pencil icon is no longer highlighted, because the ownership of the plan has been transferred from Luke to Aaron.

Here's a tip: it is a good idea to send your employee an e-mail to let him or her know that the plan has been transferred for his or her review.

As a rating official, Luke has completed the performance planning process until Aaron reviews the plan and provides feedback. Luke selects **Logout** to end the session.

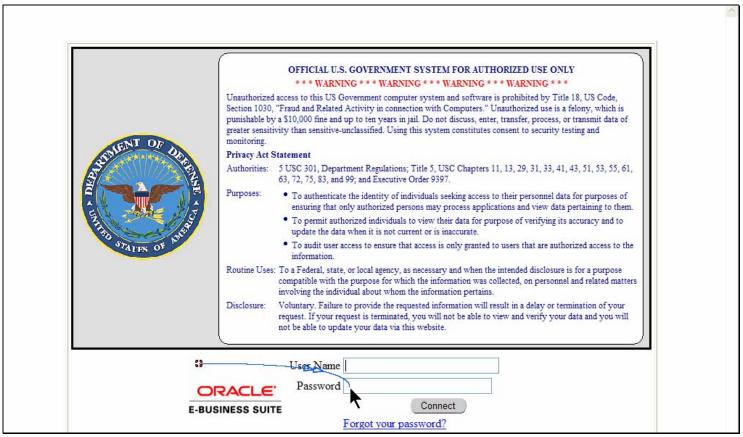


Text Captions

As a rating official, Luke has completed the performance planning process until Aaron reviews the plan and provides feedback. Luke selects **Logout** to end the session.



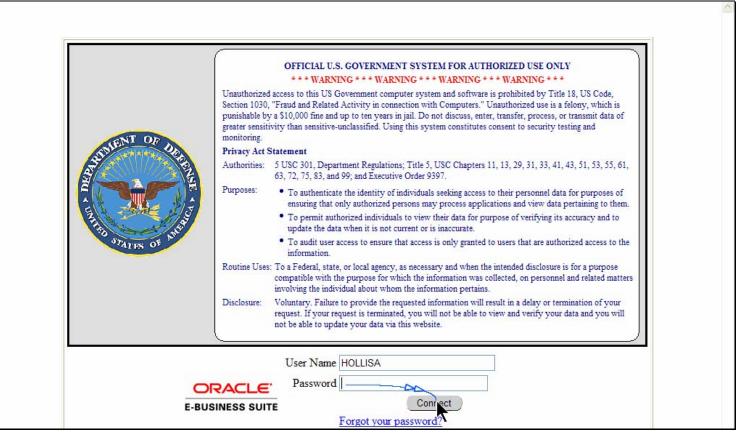
Logging on as an employee and editing a performance plan.



Text Captions

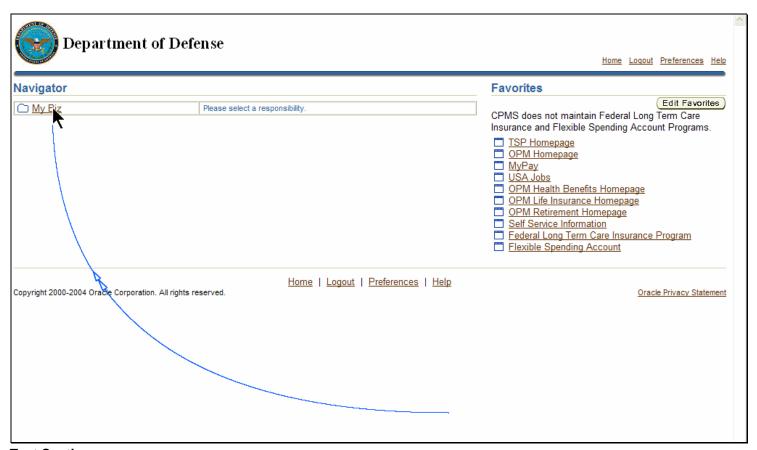
For the purpose of this demonstration we will log on as employee Aaron Hollis.

To begin, Aaron logs on to **My Biz** at the URL provided by his Component. He enters his user name and password.

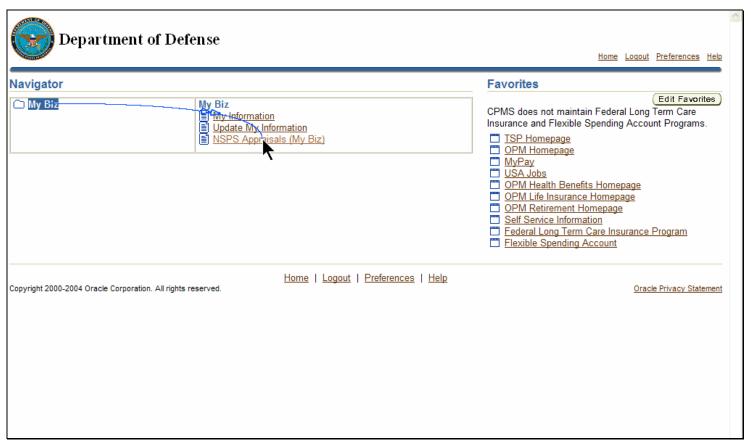


To begin, Aaron logs on to **My Biz** at the URL provided by his Component. He enters his user name and password.

He then selects Connect.

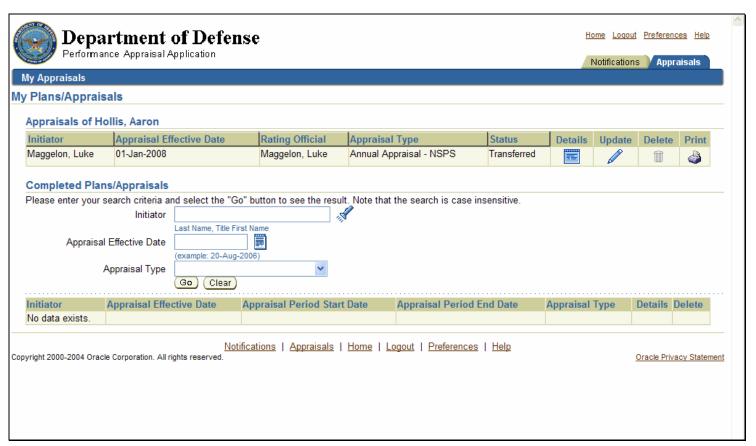


He selects My Biz, then NSPS Appraisals (My Biz).

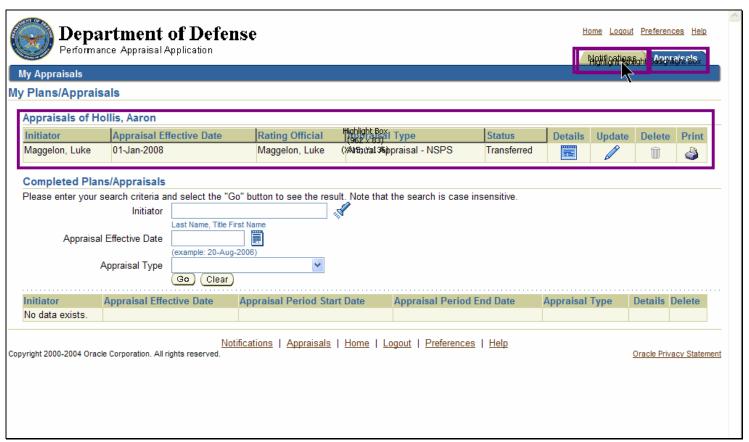


Text Captions

He selects My Biz, then NSPS Appraisals (My Biz).



He is directed to the My Appraisals - My Plans/Appraisals page.



Now let's take a look at what is on this page: My Plans/Appraisals.

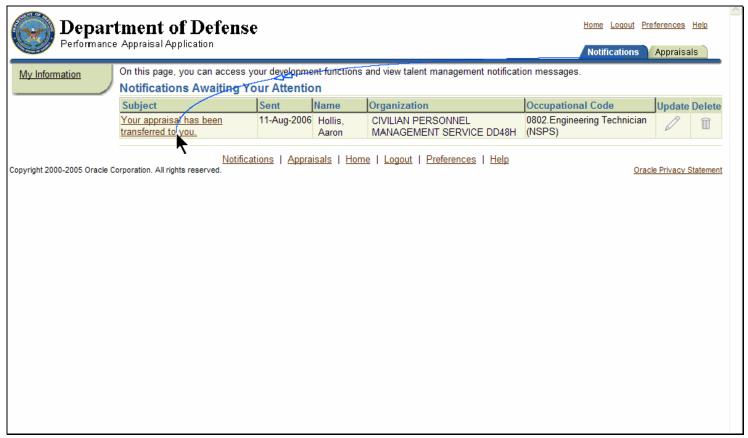
At the top right corner there are two tabs:

Notifications - This is a place to find messages from the rating official.

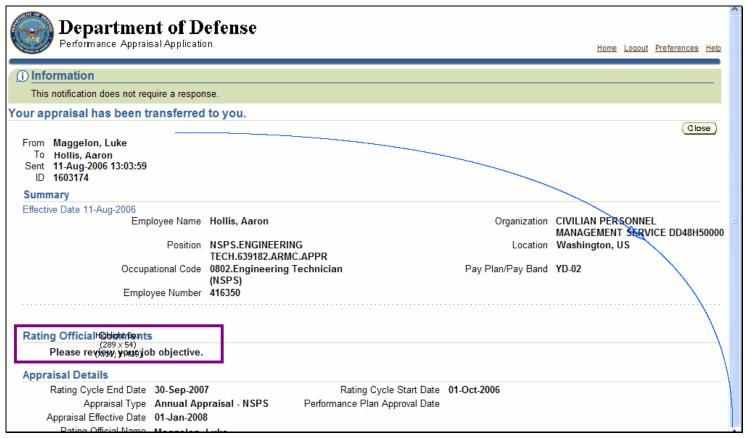
and **Appraisals** - this is a place to find appraisal information.

The middle of the page provides a summary of the performance plan status.

To view the message from his rating official, Luke Maggelon, Aaron selects **Notifications**.

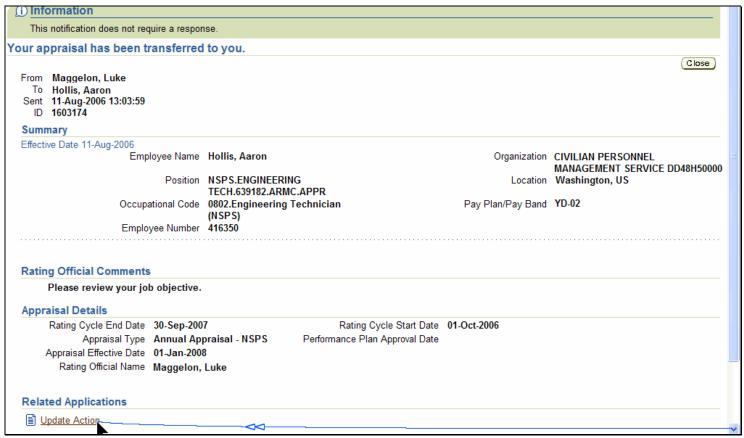


To view the notification, he selects the subject of the notification he wants to view.

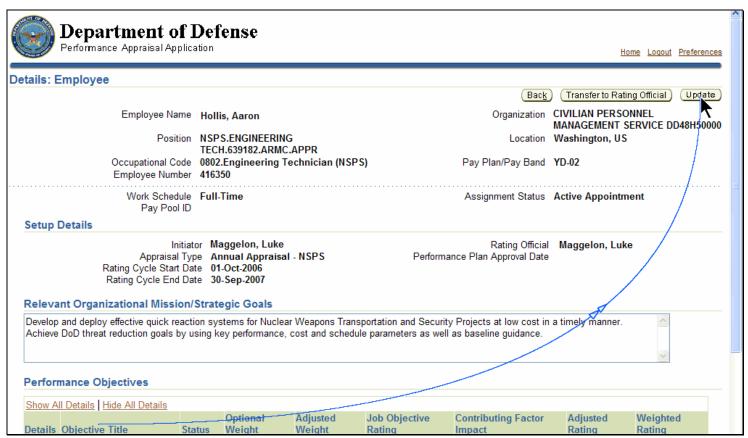


Luke's message appears under the notification comments.

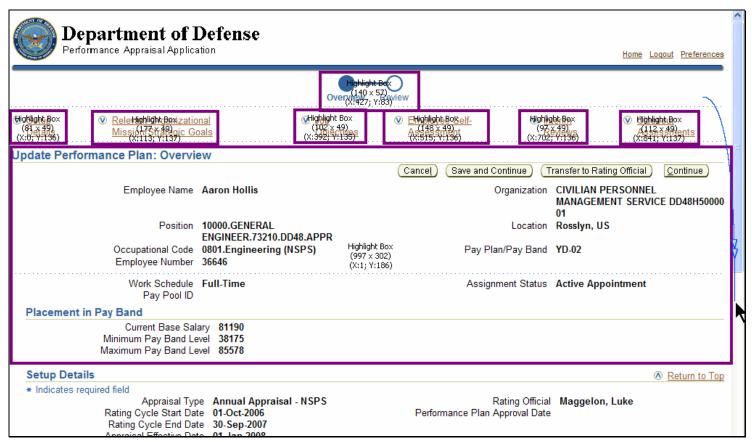
The notification page provides information such as who sent the notification, the date and time when it was sent, summary information, and comments provided by the rating official.



Aaron selects **Update Action** to access the performance plan and then selects **Update** to continue.



Aaron selects **Update Action** to access the performance plan and then selects **Update** to continue.



He is now on the Overview page. Recall that Luke, the rating official, had three steps to complete in the planning process. Aaron, as an employee, has two: step 1, Overview, and step 2, Review.

On the Overview pages, employees may edit their job objectives and review their plans. Take a look at the top of the page. Notice that there are links to the following:

Setup Details - By selecting this link you see relevant employee information such as occupation, pay schedule, pay band, and salary.

Relevant Organizational Mission/Strategic Goals - By selecting this link you view the mission, organizational goals, and other relevant information used to ensure that job objectives are aligned with the organization's goals.

Job Objectives – By selecting this link you can enter the draft job objectives. Remember: typically employees have between three and five objectives.

Employee Self-Assessment – By selecting this link, you can document your self-assessment for the interim review and annual appraisal.

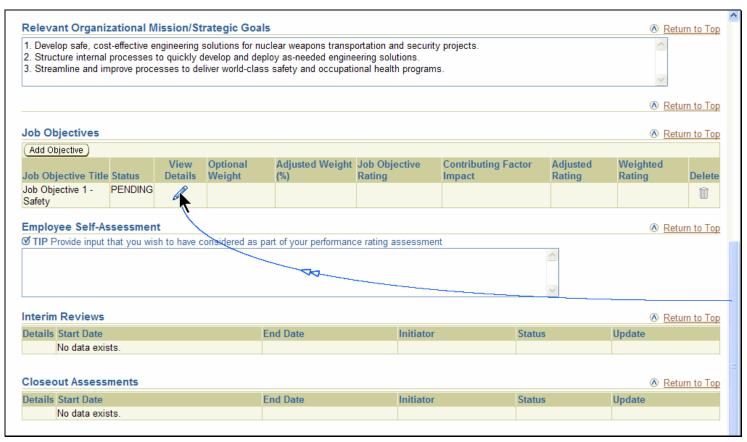
Interim Reviews - By selecting this link, you can view information related to the interim review. Remember: At least one interim review is required.

Closeout Assessments - By selecting this link, you can review your closeout assessment if you are leaving the organization before the end of the appraisal period.

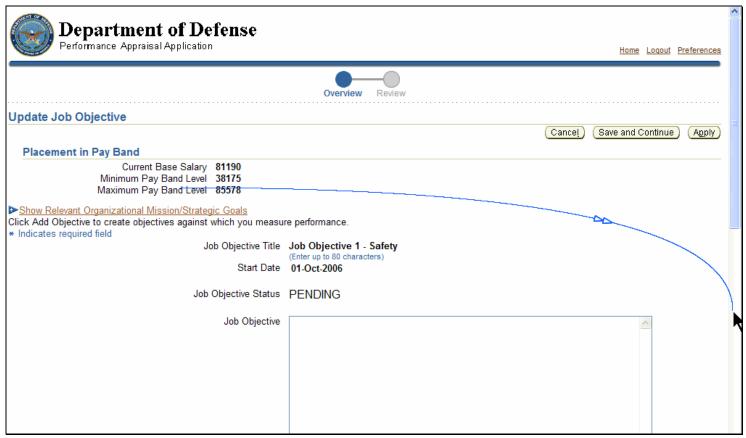
The top of the page provides details regarding your occupation, salary, pay schedule, pay band, and placement in the band. Your rating official used this information, along with other considerations, when developing your draft plan.

Now, the Aaron has a chance to provide his input.

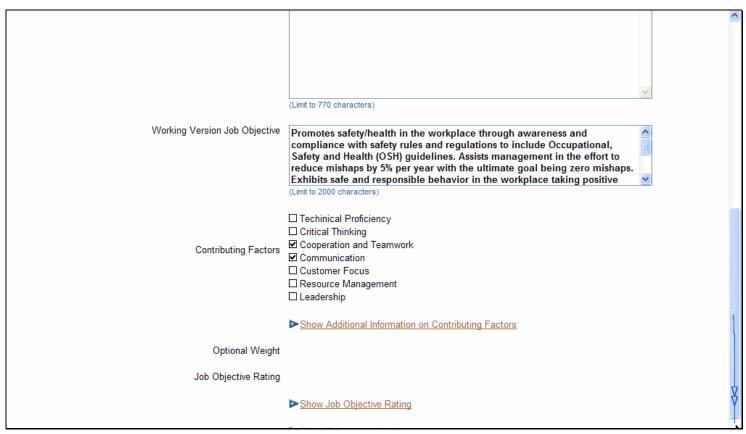
He wants to look at the job objective Luke entered for him. Aaron scrolls to the job objectives area and selects **View Details**.



He wants to look at the job objective Luke entered for him. Aaron scrolls to the job objectives area and selects **View Details.**



Note that the Job Objective area is read-only. If Aaron wants to edit or comment on an existing job objective, he must use the Working Version Job Objective text box to do so.

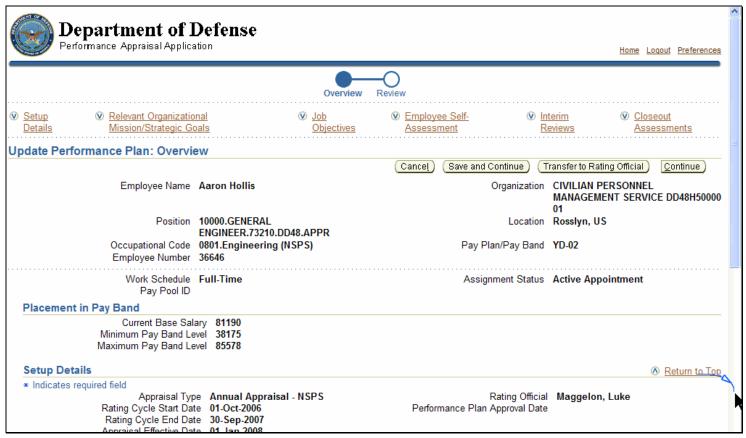


He may also review the contributing factors associated with each existing job objective and the weights of each job objective, if used. Note that only the rating official can edit contributing factors and determine weighting of objectives.

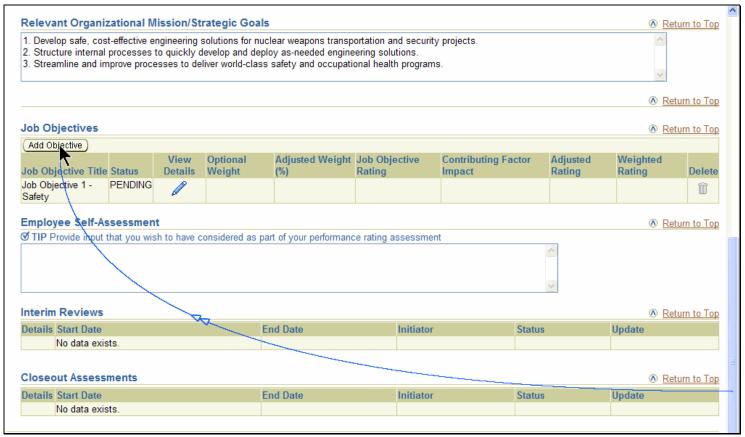
Aaron wants to create a new job objective. To do this, he first scrolls to the **Apply** button and selects it.

Contributing Factors	El Cooperation and Teamwork
Contributing Factors	☑ Communication
	☐ Customer Focus
	☐ Resource Management
	Leadership
	► Show Additional Information on Contributing Factors
Optional Weight	
Job Objective Rating	
	► Show Job Objective Rating
	Show Performance Indicators
	<u> </u>
Contributing Factor Impact	
	► Show Contributing Factor Impact
	► Show Additional Information on Contributing Factor Impact
Adjusted Rating	
Adjusted Weight	
, ajastos troigin	
Weighted Rating (If Used)	
	Cancel Save and Continue Apply
	Home Logout Preferences
Copyright 2000-2004 Oracle Corporation. All rights reserved.	Oracle Privacy Statement
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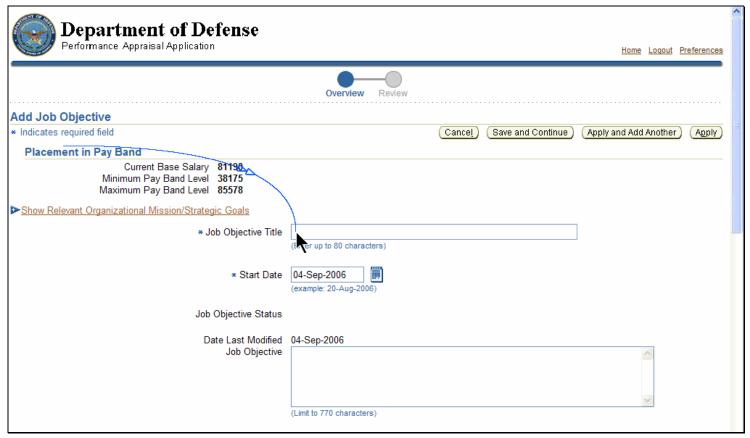
Aaron wants to create a new job objective. To do this, he first scrolls to the Apply button and selects it.



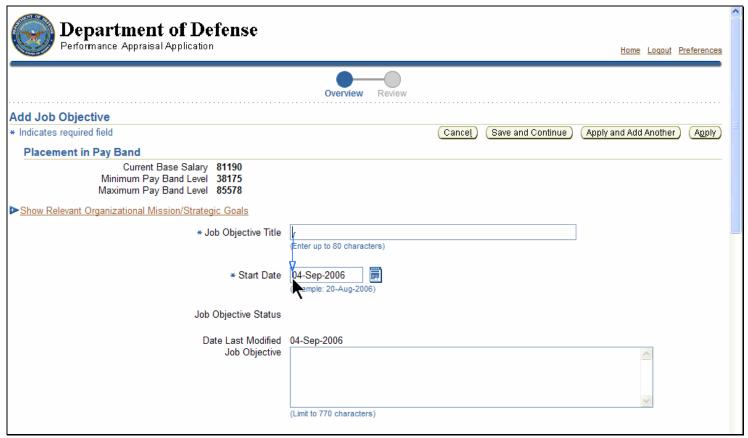
Then he scrolls to the job objectives area and selects **Add Objective**.



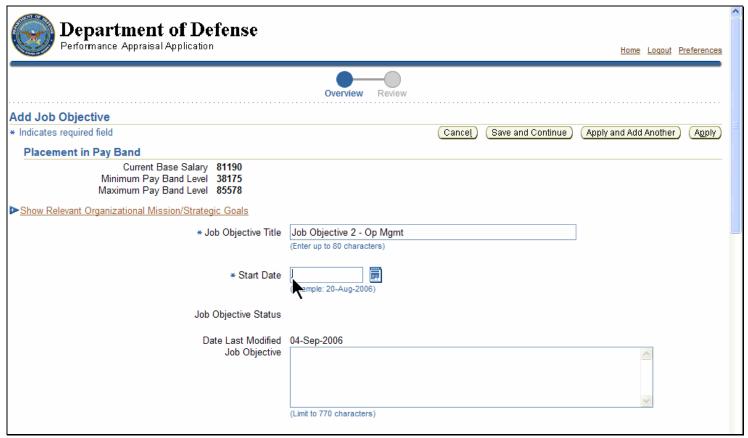
Then he scrolls to the job objectives area and selects **Add Objective**.



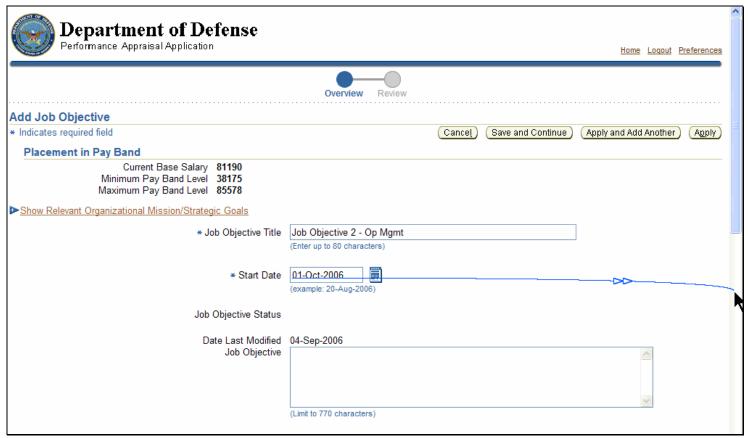
Just as Luke had to identify a job objective title, so does Aaron when he wants to add one. He enters a job objective title.



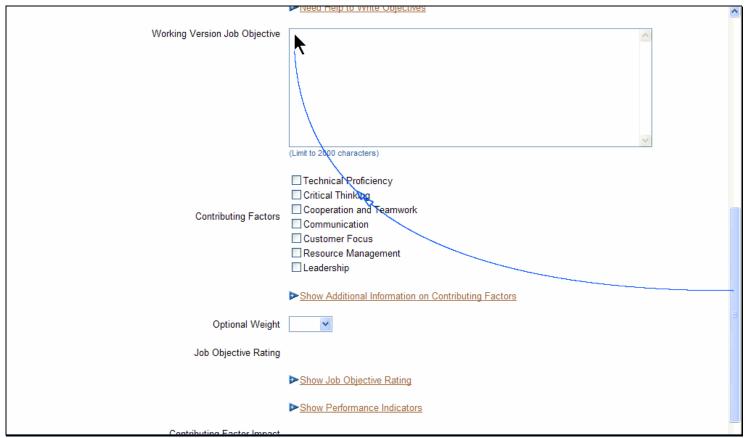
Just as Luke had to identify a job objective title, so does Aaron when he wants to add one. He enters a job objective title.



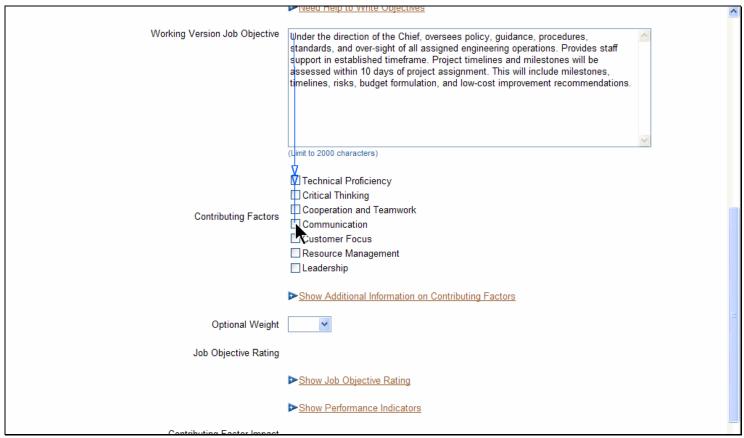
Next, he enters the start date.



Next, he enters the start date.

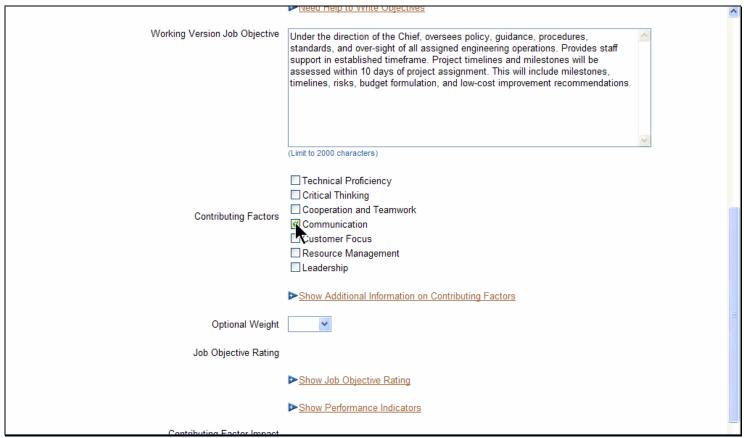


Then Aaron adds the job objective. Note that because this is a new job objective, it may be typed into the Job Objective text box, the Working Version Job Objective text box, or both.

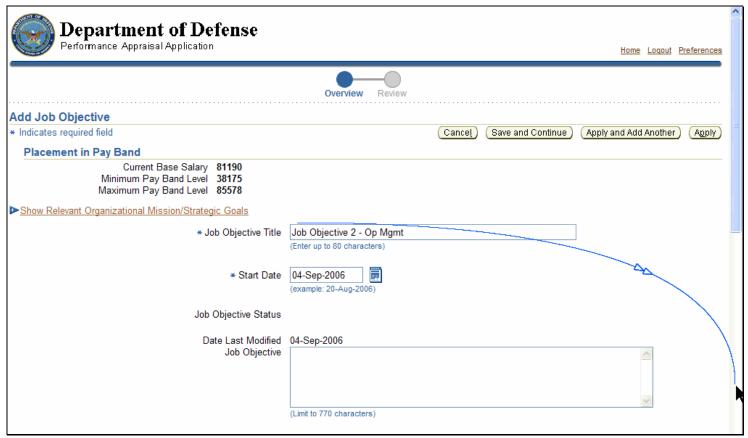


Note that Aaron's draft job objective was entered in the Working Version Job Objective text box.

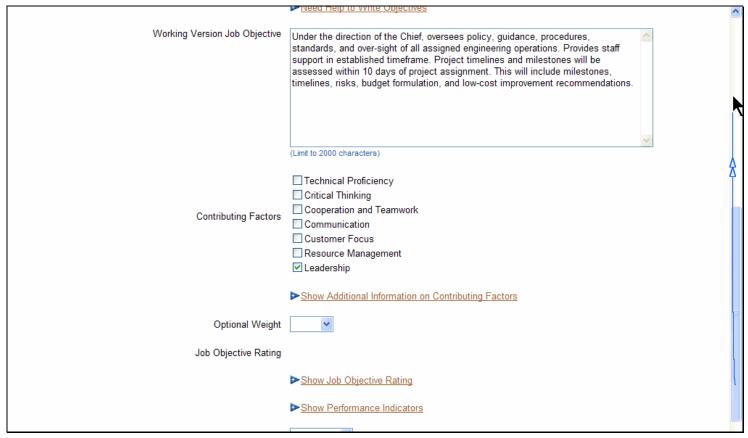
Finally, because this is a new job objective, Aaron is able to select what he feels are the appropriate contributing factors. He determines that the contributing factor Communication is appropriate.



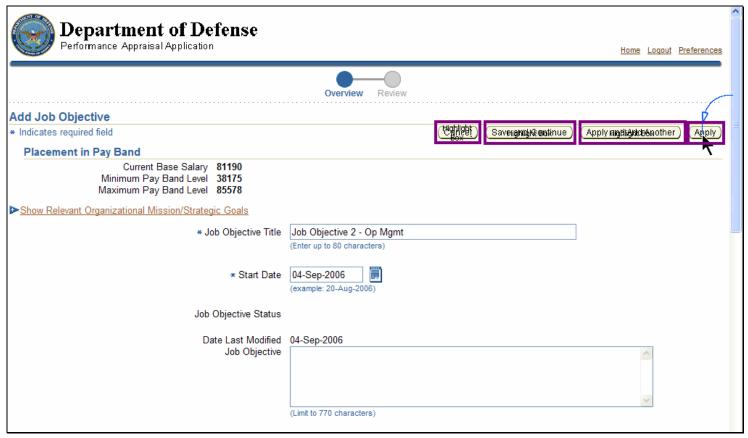
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As an employee, Aaron is not allowed to determine job objective weights, so he skips the weight section.



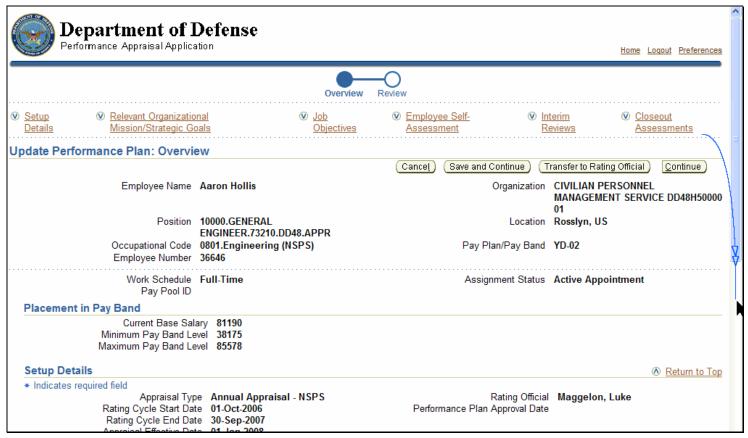
There are four buttons that appear on the top and bottom of each page in step 1:

Cancel: Selecting this button cancels all changes and returns you to the main page.

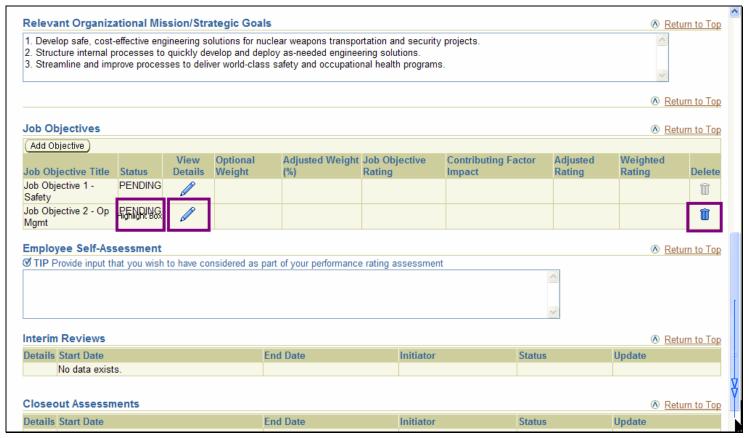
Save and Continue: Selecting this button saves your changes and allows you to proceed on the same page.

Apply and Add Another: Selecting this button saves your changes and goes to another blank job objective.

Apply: Selecting this button saves the job objective and returns to the main page. Aaron selects **Apply.**



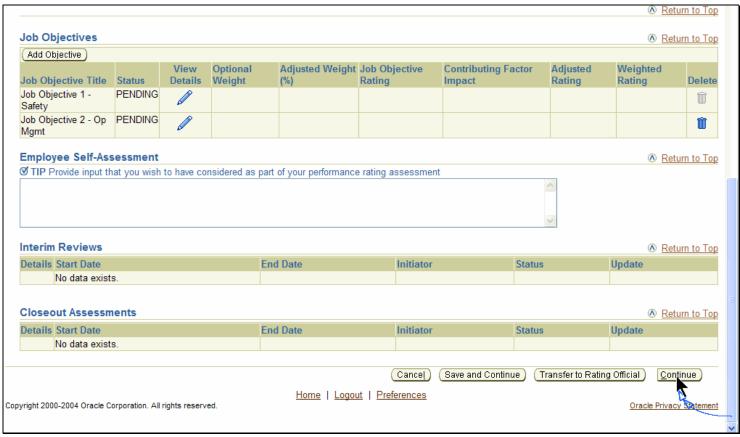
Notice that Aaron is still in step 1 on the Overview page. He scrolls down to the Job Objectives area.



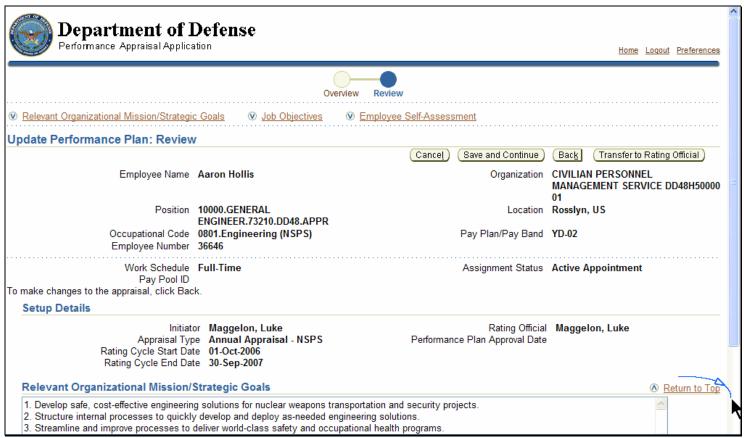
The new job objective appears in "Pending" status until it is approved.

If Aaron wants to make changes to this job objective, he could do so by selecting **View Details**.

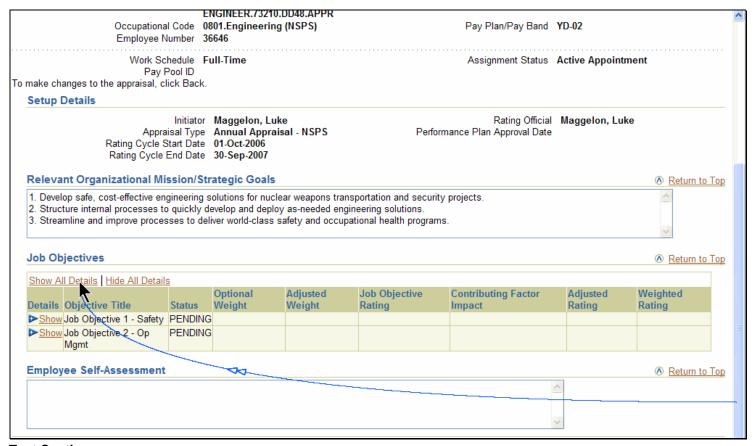
Up until the time the performance plan is transferred to his rating official, Aaron can delete *this* pending job objective by selecting **Delete**.



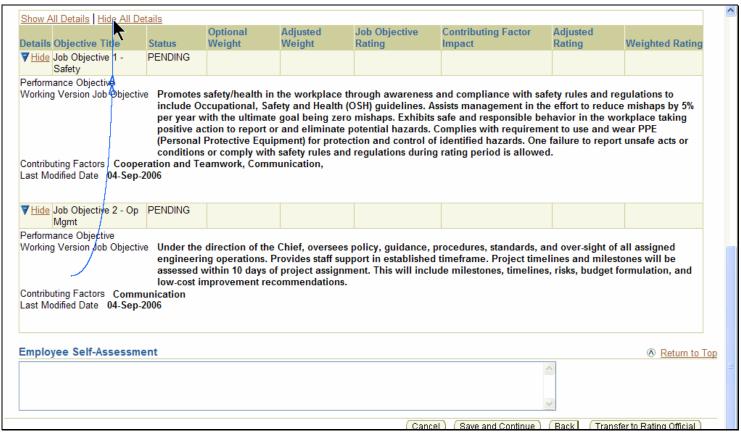
Aaron is comfortable with his plan and selects Continue to advance to step 2, Review.



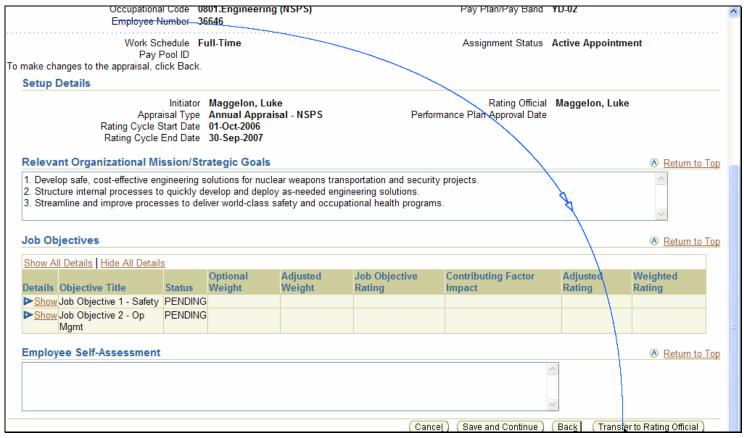
The Review page provides an opportunity to review any edits or changes to the plan.



To show the Details area of the job objectives that are currently pending, he selects **Show All Details** to view all job objectives.

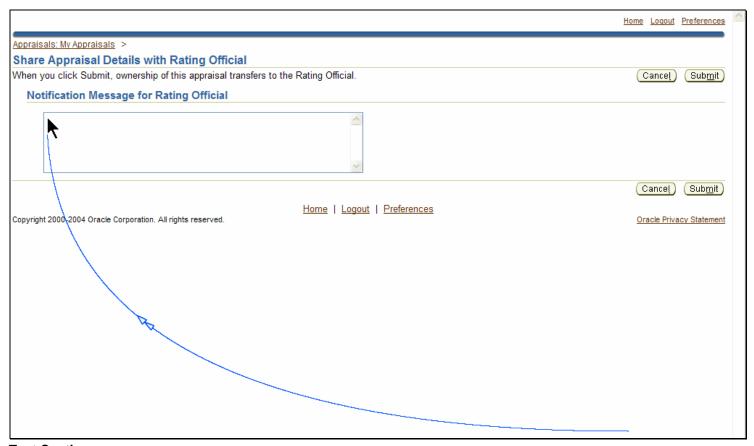


When his review is complete, he selects **Hide All Details** to return to a summary block.



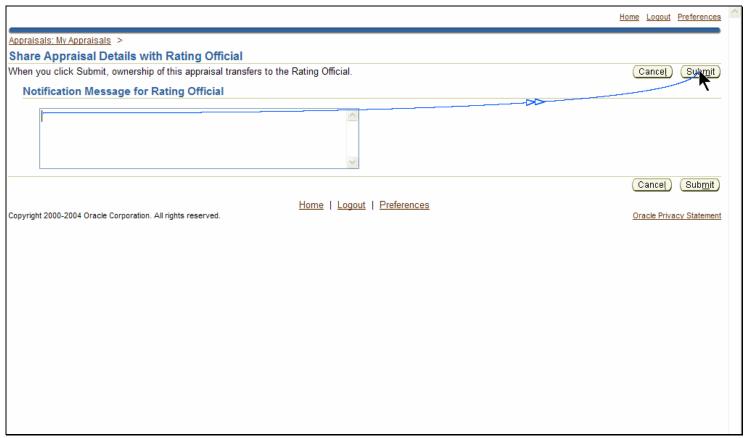
At this point, Aaron is ready to transfer the revised performance plan to Luke, his rating official.

To do so, he selects Transfer to Rating Official.



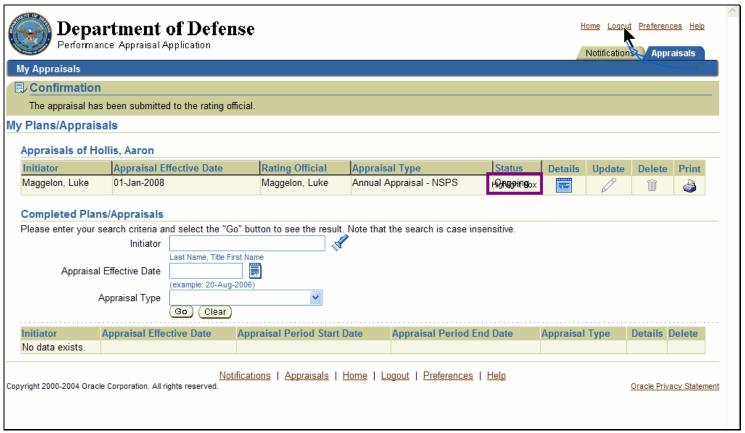
Text Captions

Aaron writes a brief message indicating that he has reviewed the plan and is offering one more job objective for Luke's consideration.



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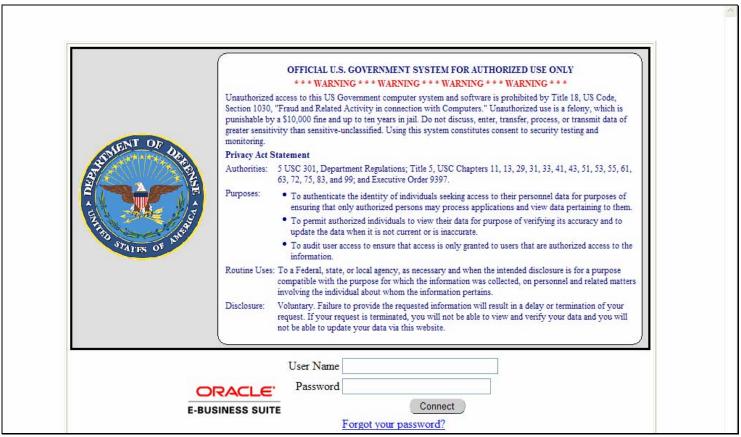
When he is done writing the message, Aaron selects **Submit**.



He is returned to the My Plans/Appraisals page.

Here's a Tip - It is a good idea to send your rating official an e-mail to let him or her know that the plan is ready for review and approval.

The status of Aaron's apprasial can be viewed under My Plans/Appraisals. The status is "ongoing," so Aaron can no longer update the plan. Aaron is done with his session and logs off.



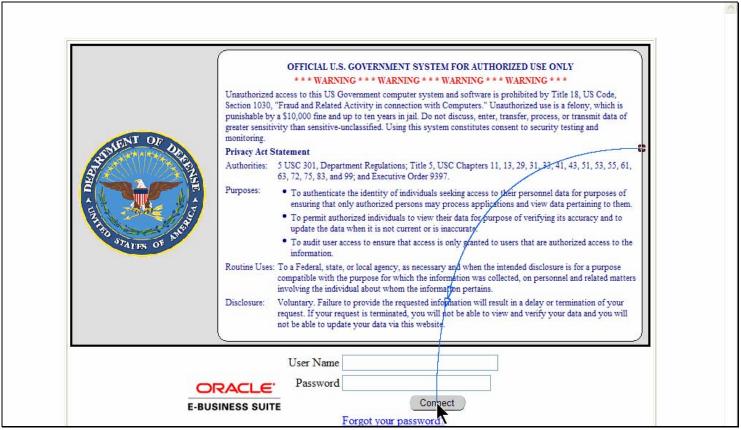
Text Captions

Now that Aaron has reviewed his performance plan and provided feedback, it is time for the rating official to review and approve the plan.



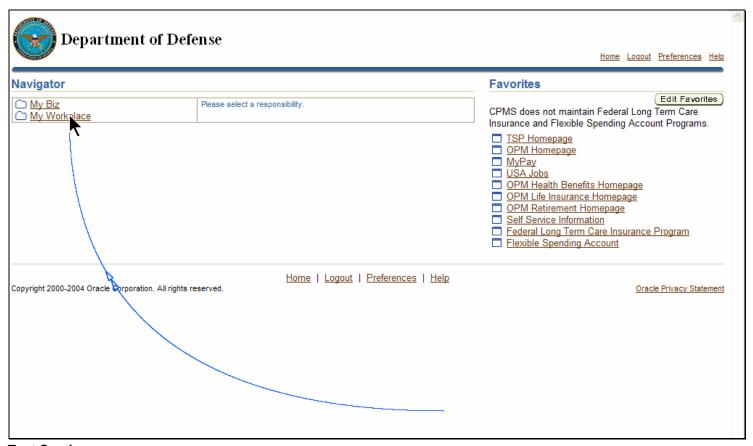
Text Captions

Logging on as a rating official and finalizing a performance plan.

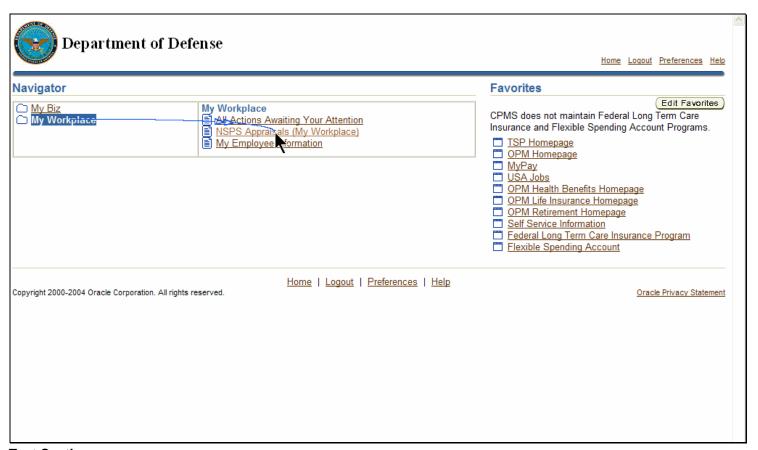


Text Captions

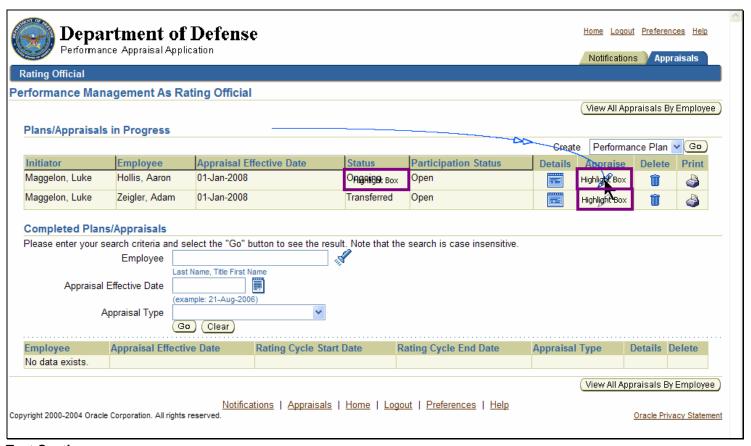
Luke logs on to the Performance Appraisal Application through **My Workplace**.



Luke logs on to the Performance Appraisal Application through My Workplace.



Luke logs on to the Performance Appraisal Application through My Workplace.

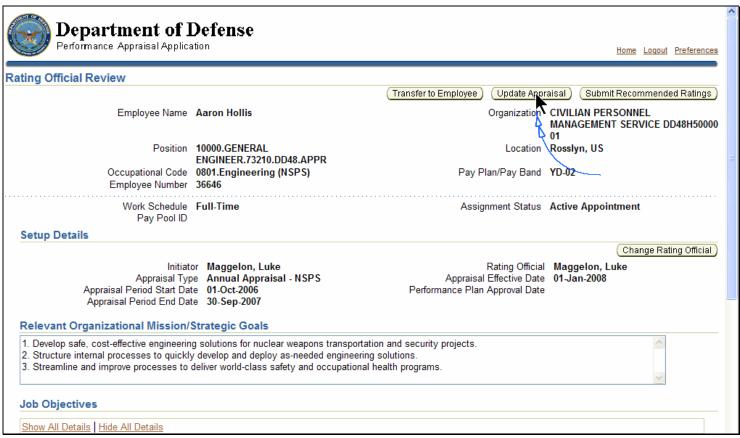


When logged on, the Rating Official - Performance Management As Rating Official page is displayed. On this page, Luke can view the status of his employees' performance plans.

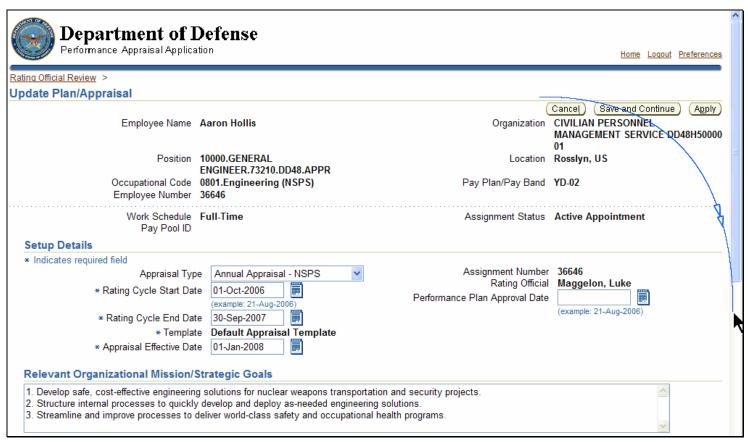
Take a look at the two employees listed. Notice that Aaron's status is "Ongoing" and that the pencil under the Appraise column is highlighted. This indicates that Luke has ownership of Aaron's plan.

Notice that the pencil for the other plan is not highlighted. This indicates that this employee currently has ownership of his plan.

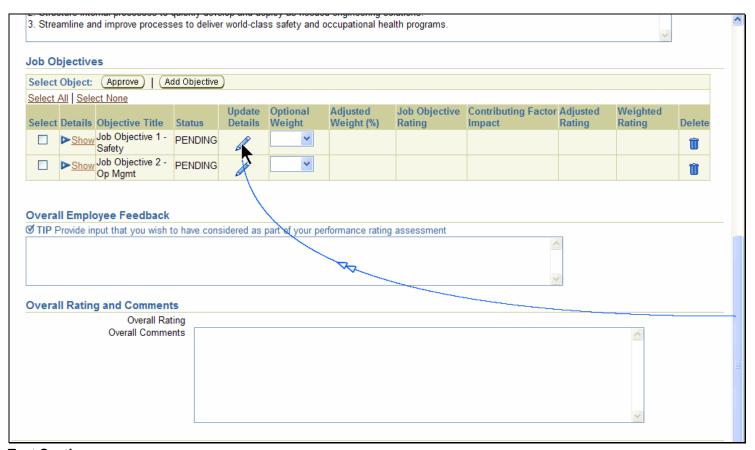
Luke selects **Appraise** to continue.



He selects **Update Appraisal** to review job objectives and associated contributing factors, and finalize them.

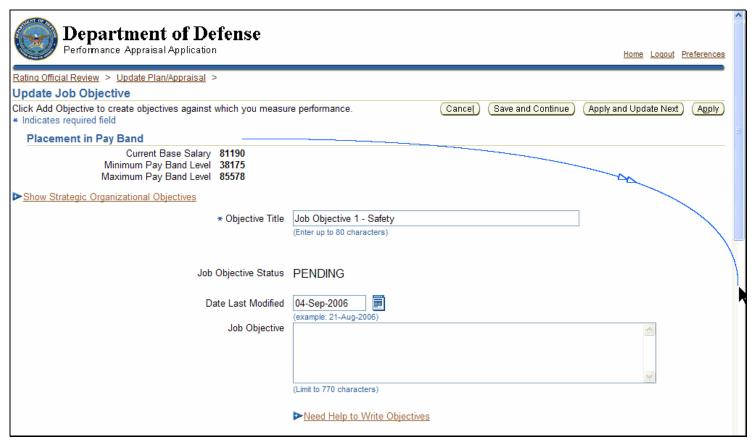


Remember that the draft job objectives are in the Working Version Job Objective text box, so Luke must cut and paste each objective into the Job Objective text box. He scrolls to the Job Objectives area.

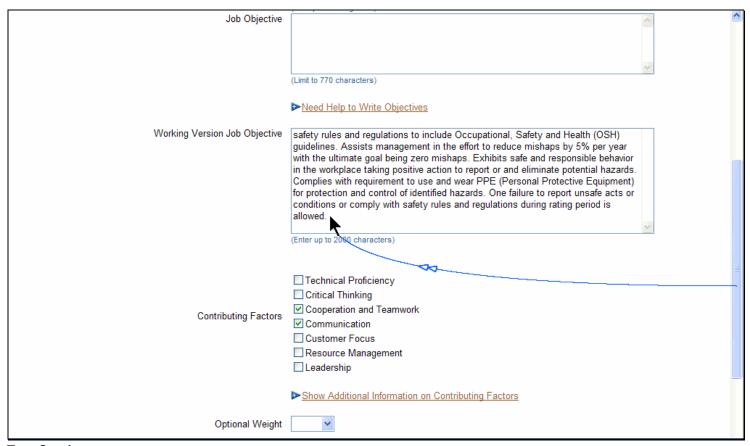


Text Captions

He selects **Update Details** to update the first job objective.

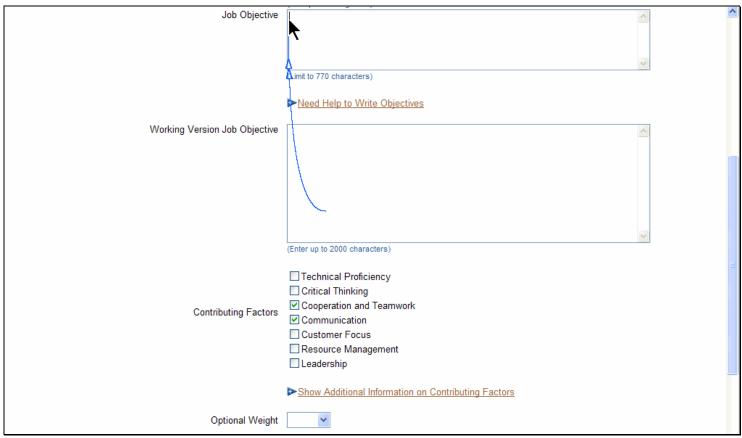


Luke scrolls to the text in the **Working Version Job Objective** field.



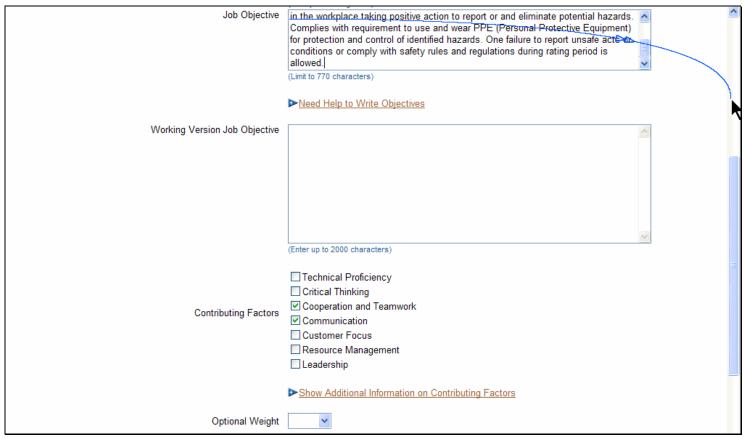
Text Captions

He copies and pastes the text from the **Working Version Job Objective** field to the **Job Objective** field.

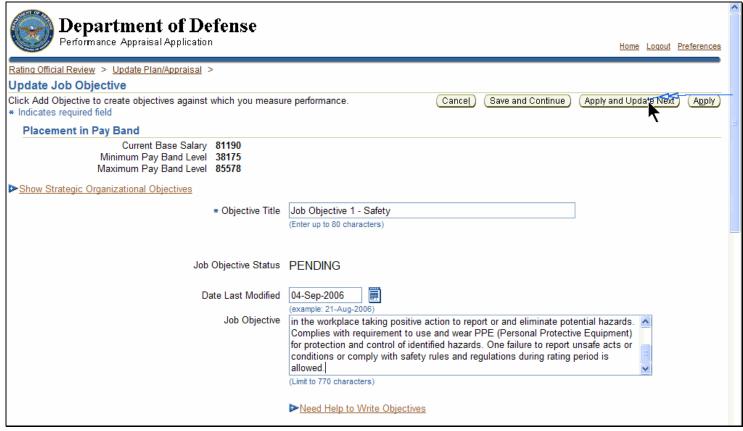


Text Captions

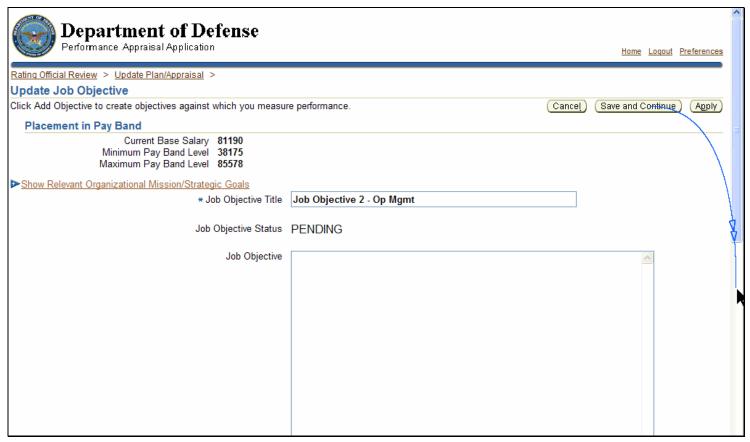
He copies and pastes the text from the **Working Version Job Objective** field to the **Job Objective** field.



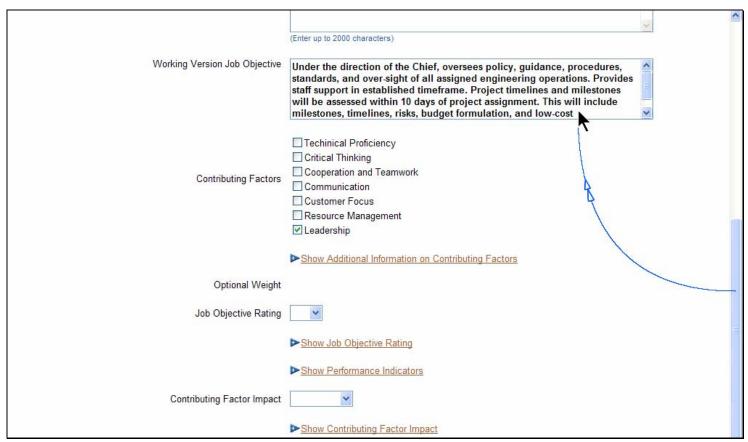
He scrolls to the buttons at the top of the page.



He selects Apply and Update Next.

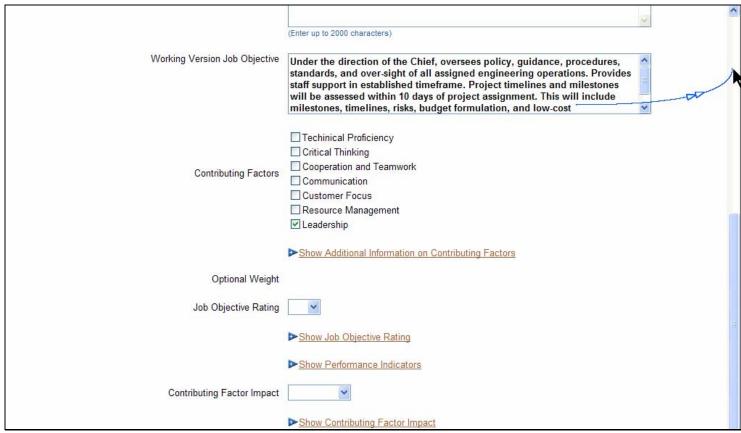


Luke scrolls to the **Working Version Job Objective** field for the second objective.



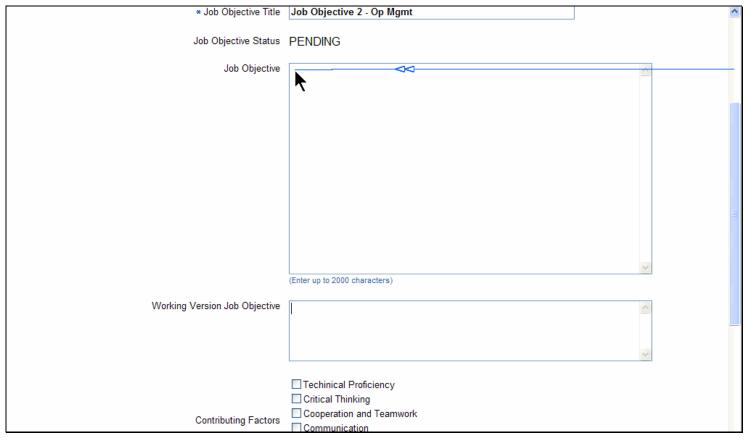
Text Captions

And he copies and pastes the text for this objective like he did for the first one.



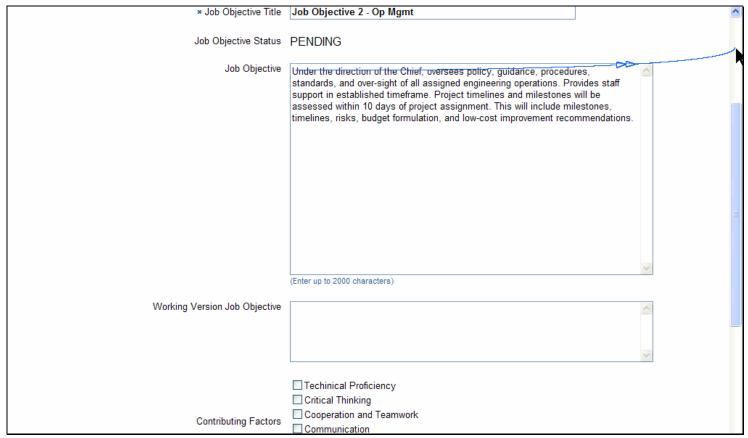
Text Captions

And he copies and pastes the text for this objective like he did for the first one.

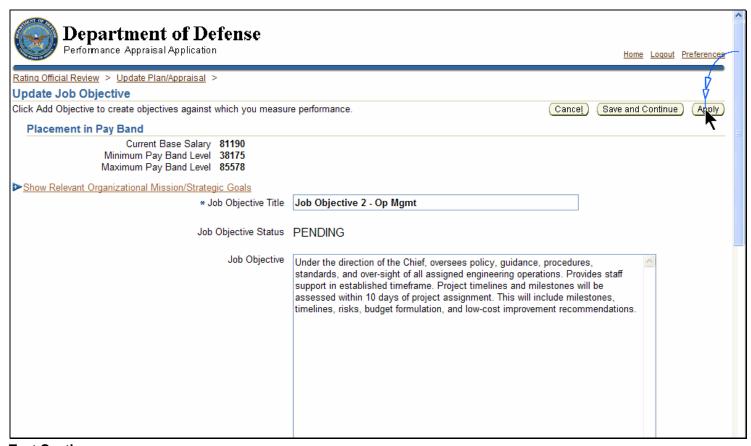


Text Captions

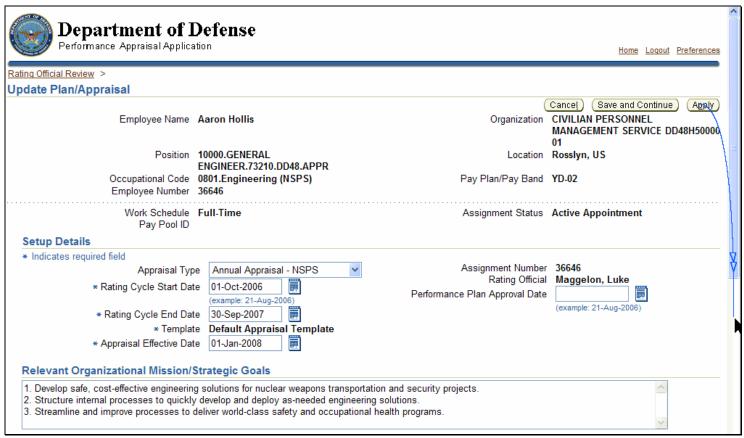
And he copies and pastes the text for this objective like he did for the first one.



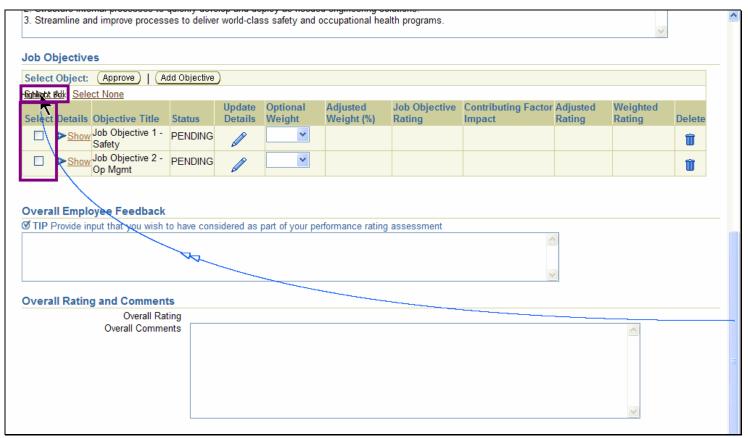
He scrolls to the top of the page.



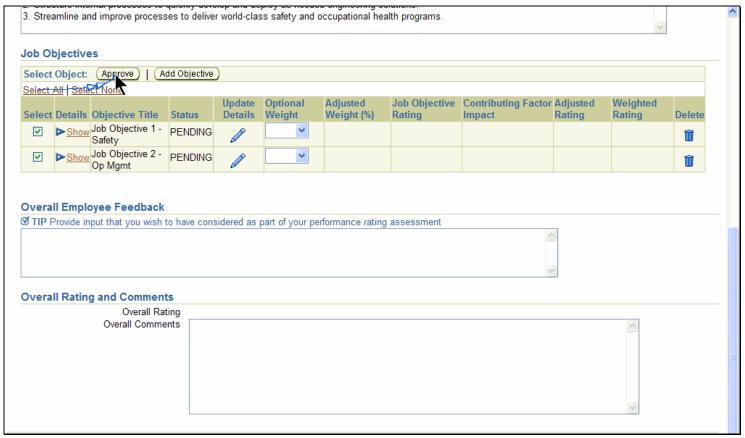
Then he selects **Apply**.



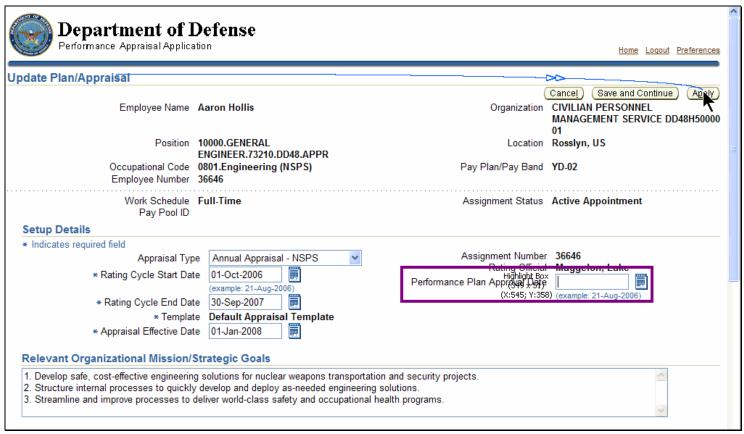
Luke is transferred to the Update Plan/Appraisal page. He scrolls to the Job Objective section and notices that the job objectives are pending. As a rating official, Luke has two options to approve job objectives:



He can individually approve each objective by selecting **Select** for each objective; or he can select **Select All** to approve all the job objectives at one time.



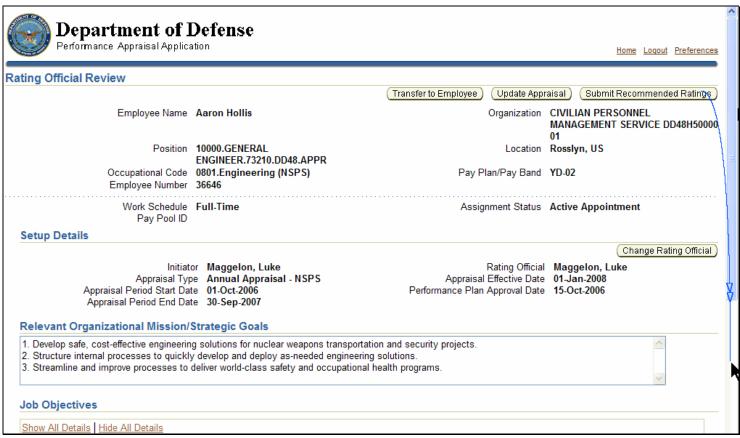
Then he selects the **Approve** button. When the selection is made, the job objective status switches from "Pending" to "Approved."



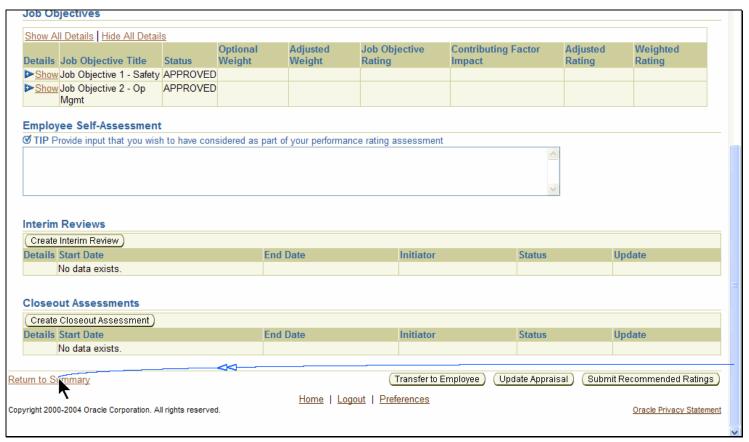
There are two more steps as a rating official Luke needs to complete.

First, he goes to the Setup Details section and enters the performance plan approval date.

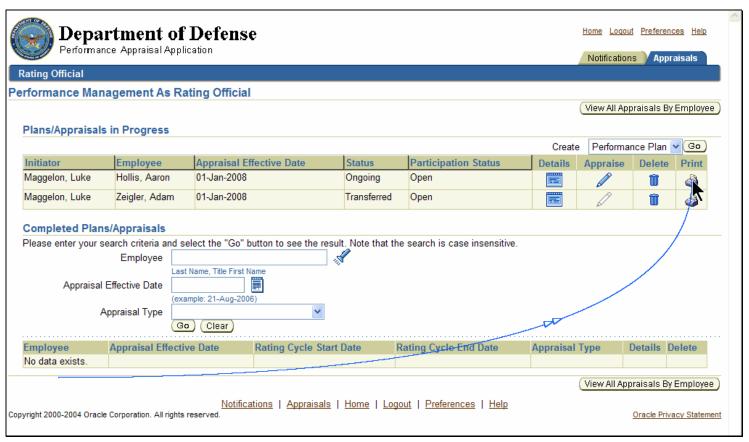
Finally, he selects **Apply**.



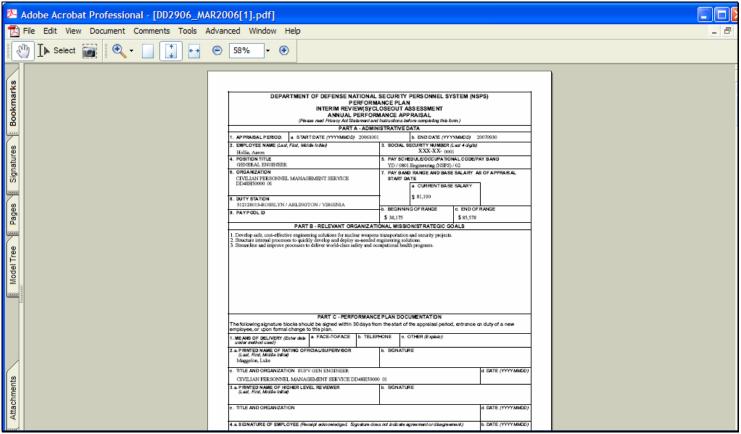
He is returned to the Review page. He reviews the performance plan one last time. When satisfied, he selects **Return to Summary** at the bottom left corner of the page.



He is returned to the Review page. He reviews the performance plan one last time. When satisfied, he selects **Return to Summary** at the bottom left corner of the page.

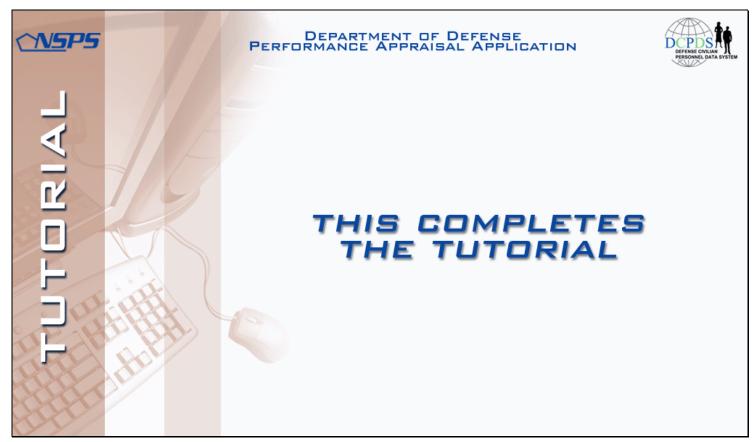


He is returned to the Plans/Appraisals in Progress page. From this page, Luke may view or print the performance plan on DD Form 2906 by selecting **Print** (the last icon on the row for each performance plan).



Text Captions

He is returned to the Plans/Appraisals in Progress page. From this page, Luke may view or print the performance plan on DD Form 2906 by selecting **Print** (the last icon on the row for each performance plan).



Congratulations! This completes the demonstration of how to use the Performance Appraisal Application to establish a performance plan.

As you can see, the online tool supports and facilitates ongoing communication throughout the planning process and is a quick and easy tool to learn and use.

To support you as you spiral into NSPS, DoD is developing a series of user guides, online tutorials, and Web-based training to support use of the online tool suite.

For additional information on NSPS or the suite of online tools, visit the following Web sites:

Your Component web site

http://www.cpms.osd.mil/nsps/performance_management.html

http://www.cpms.osd.mil.

We wish you well as you embark on completing your first NSPS performance plan.